


MARKETING COLLATERAL • 1990



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OUTSOURCING OF INFORMATION SYSTEMS

INPUT[®]

Join INPUT's analysts and knowledgeable guests to discuss the potential revolution in the 1990s in the development and operation of computer/communications systems.

**June 7 & 8, 1990
Omni Shoreham Hotel
Washington, D.C.**

Limited attendance—please confirm early to avoid disappointment

Outsourcing of Information Systems

INPUT's 12th Annual Executive Conference

Attend this conference on outsourcing in information systems to evaluate the opportunities and problems associated with the various approaches.

For 30 years the primary source of computer/communications systems development and operations has been internal departments. During this time, however, there has been an overgrowing computer software and services industry providing solutions to customer needs. This industry, the information services industry, is now a \$180 billion per year market worldwide.

The revolution in the 1990s is the shift from internal to external sources of software and solutions. This revolution is happening more rapidly than many expected.

This conference is about that revolution.

Questions to be addressed by INPUT analysts and panels of invited guests include:



What is "outsourcing?"

Why is it becoming so much a concern today?

What are the different vehicles for outsourcing?

How will the various markets develop?

What are the market forecasts through 1995?

Who takes responsibility?

What are the impacts on "competitive advantage?"

What about security when using external vendors?

What are the financial costs and benefits?

What about impacts on information systems organizations and people?

What is "change management?"

What is the role of business consultants in outsourcing?

Which vendors are offering what services?

What have been customer experiences of outsourcing?

What are the relationships between systems integration and systems operations?

What sources of skills will be used in the future?

What opportunities exist for customers and vendors?

What will be the impact on information systems and services vendors? Who will win?

These and many other questions, will be addressed during this critical conference...You are invited to presubmit your questions.

INPUT's

12th Annual Executive Conference

OUTSOURCING OF INFORMATION SYSTEMS

June 7 & 8, 1990

Omni Shoreham Hotel
Reston, Virginia, U.S.A.

Register today
by calling
any INPUT office

Fee Schedule

The regular conference fee is \$1395; \$995 for additional attendees from the same company. Subscribers to INPUT's Market Analysis Program may attend at the fee of \$495 per person.

Registration Form

Yes! Please sign me up for the Annual Executive Conference, June 7 & 8, 1990 at the Omni Shoreham Hotel, Reston, VA, U.S.A.

- ☐ Check enclosed in the amount of \$ _____
- ☐ Bill me in the amount of \$ _____ on Purchase Order # _____. Payment must be received before conference.
- ☐ Charge \$ _____ to my American Express # _____.
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Title: _____

Company: _____

Address (include zip or country): _____

Telephone: (_____) _____ Signature: _____

(Please duplicate this form for additional attendees and return the forms together)

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or contact any INPUT office listed below.

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INPUT's Executive Conference has been the prime forum for examining future trends in information services for the past 12 years. The combination of experienced computer industry professionals, objective research, and strong customer interaction has produced an environment for the presentation of new ideas and the identification of trends that have actually come to pass.

In the last ten years, the growth of the microcomputer (pre-PC) in business (1980), the importance of connectivity and networks (1982), systems integration (1984), and systems operations (1988) have been among the keynote projections of this conference.

Who should attend?

"Outsourcing" is the conference to attend to determine the direction your company should take. To what extent should you participate in the markets as a buyer or seller; in some cases as both? The conference is for people with these questions.

- ◆ CIOs
- ◆ Planning Executives
- ◆ Business Executives with Information Systems Customers and Vendors
- ◆ Software and Services Executives

Key Benefits of Attending:

Discuss this critical issue with INPUT analysts, customers, and vendors involved in outsourcing.

- ◆ Learn about the trends and potential impacts on the industry of "outsourcing."
- ◆ Examine the competitive structure of the industry to determine the "players."
- ◆ Obtain the necessary information to direct your company's position in this arena.
- ◆ Get ahead of the curve as the revolution rolls forward.



**Information Systems Outsourcing —
A Global Perspective:**

The switch from internal to external sources of information systems resources has been occurring for years. The information services industry provides customers with the external capabilities. How big is this business on a worldwide basis? What are the overall trends

in the U.S., Europe, and Japan? This session forms the framework for the conference answering basic questions as to "Why?" and "Why Now?"

The session presents major types of outsourcing and how they relate; leading competitors in the industry are introduced.

Systems Development Outsourcing:

These services are devoted to the development, installation, and maintenance of applications.

Systems Integration—Acceptance:

In the last six years, systems integration has become accepted by non-federal government organizations as a viable method of developing systems that work. The concept of a vendor taking responsibility for the development and installation of complex systems has proven appealing to customers faced with increasing demands and limited resources.

In this session, INPUT will discuss with participants in the industry; customer requirements, success criteria for SI projects, partnering aspects that work or fail, and projections of the types of systems integration projects that will grow in the 1990s. Particular attention will be paid to network integration and image processing applications.

**Professional Services—Multiplicity of
Choice:**

The prime alternative to in-house information systems staffing is to use professional services resources. The driving forces, including labor scarcity, employment considerations, and flexibility are examined in this session.

Each major type of professional service is examined, as well as "project responsibility" and "resource" contracting alternatives. The concepts of "systems management," "change management," and contracted maintenance are introduced and discussed with proponents in the industry.

**Applications Software Products—
Part of the Solution:**

These packages provide alternatives to custom-made software. As with other "off-the-shelf" items, they must be tailored to the customer's specifications. This session examines how this is accomplished. The overall factors influencing the growth of the market and the "make or buy" decisions are examined.

The affects of trends to standard platforms are analyzed as are the impacts of increasing use of CASE technology. Repository and automated library functions are discussed by industry experts: they will change the concept of application development and implementation.

The convergence of custom and package software is examined together with the implications for customers and providers.

Interaction:

The day will close with an intense question and answer period involving customers, vendors, and INPUT analysts. Attendees may pre-submit questions to be addressed during this session.

The evening will include a reception for attendees to provide an opportunity for free discussion and the formation of dinner groups.

Systems Operations Outsourcing:

These services are devoted to the operation of computer/communications systems.

Systems Operations— The Revolution of the 1990s?

Systems Operations is potentially the most revolutionary market of the 1990s. It is an outgrowth of "facilities management"—but customers do not buy management of a facility, they buy operation of a computer/communications system in which they participate in the management. Recent events such as the entry of large computer manufacturers and professional services companies have stirred up this market.

The financial methods employed, the reasons for systems operations as a viable alternative to in-house information systems, and the various forms of systems operations are all explored with participants in the industry. Computer ownership and location issues are addressed and INPUT research and forecasts presented.

Relationships with systems integration and their services are examined. Vendor approaches to platform and application operations are discussed with the implications for customers.

The impact on the rest of the industry of systems operations is considerable. Financing implications abound. These are examined in detail by INPUT and its guests.

Processing Services—Variety and Growth of Outsourcing Alternatives:

Many companies use some form of processing service from payroll through industry specialized services such as credit card processing. Disaster recovery is another service which is "enjoying" increasing use.

These services are bought on an application-by-application basis as opposed to the "complete package" as with systems operations. Their use is steadily increasing. Through mergers and acquisitions, some of the vendors are becoming very large, with the ability to afford the development costs for the new generation of systems.

INPUT will examine processing services positions in the outsourcing spectrum and projections for 1995. Customer needs for transaction processing and services will be discussed.

Network Applications and Operations Services—The Battleground of the 1990s

The final structured session of the conference examines customers' alternatives in the network area.

As telecommunication networks become more complex and powerful, they will provide numerous opportunities for outsourcing. Various outsourcing alternatives in the development and operation of networks are examined including network integration and operations service. Sources of service are discussed.

In particular, the impact of the telephone companies will be considerable on an international basis. Their rapid expansion is examined and the implications critiqued.

Interaction:

The conference will conclude with another intensive question and answer period with vendors, customers, and INPUT analysts.



OUTSOURCING OF INFORMATION SYSTEMS

Day One	7:30 - 8:30	<i>Registration and Continental Breakfast</i>
	8:30 - 9:30	Information Systems Outsourcing <ul style="list-style-type: none">• Global Perspective• Internal and External Factors• Competitive advantages/Disadvantages
	9:30 - 9:45	<i>Break</i>

Systems Development Outsourcing

9:45 - 11:30	Systems Integration <ul style="list-style-type: none">• Industry Trends and Forecasts• Responsibility Issues• Vendors and Capabilities	<ul style="list-style-type: none">• Approaches• Customer Requirements
11:30 - 1:00	<i>Lunch</i>	
1:00 - 2:30	Professional Services <ul style="list-style-type: none">• Industry Trends and Forecasts• Labor and Skills Considerations	<ul style="list-style-type: none">• Conversion• Systems Management
2:30 - 2:45	<i>Break</i>	
2:45 - 4:15	Applications Software Package Solutions <ul style="list-style-type: none">• Industry Trends and Forecasts• Application Development Issues• Combinations with Professional Services• Partnering Among Vendors	
4:15 - 5:00	Questions and Answers	
5:30 - 7:30	<i>Cocktail Reception</i>	



Day Two

7:00 - 8:00

Continental Breakfast

Systems Operations Outsourcing

8:00 - 10:00

Systems Operations

- Industry Trends and Forecasts
- Financial Consideration
- Method of Operation
- Customer Requirements
- Security

10:00 - 10:15

Break

10:15 - 11:30

Processing Services

- Industry Trends and Forecasts
- Transaction Processing by:
 - Industry (eg., Banking)
 - Function (eg., Payroll)
- Application Sources
- Vendor Trends

11:30 - 1:00

Lunch

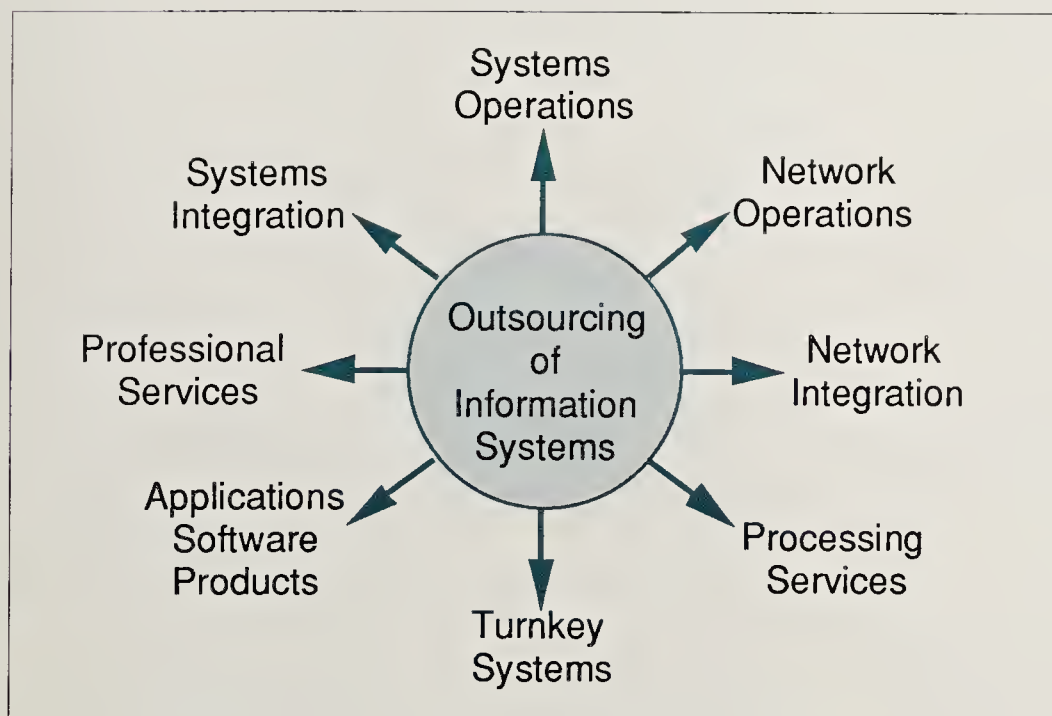
1:00 - 2:30

Network Operations

- Industry Trends and Forecasts
- Customer Requirement
- Vendor Sources
- Public versus Private Networks
- Network Management Services

2:30 - 3:30

Questions and Answers



OUTSOURCING OF INFORMATION SYSTEMS

June 7 & 8, 1990, Omni Shoreham Hotel, Washington, D.C.

CONFERENCE REGISTRATION

Conference fees:

- First attendee from a company\$1395
- All additional attendees\$995

Subscribers to INPUT's Market Analysis Program may attend at the fee of \$495 per person.

PAYMENT AND CANCELLATION POLICY

You may cancel your reservation without a 25% cancellation fee until May 9.

Cancellations must be in writing. INPUT will consider purchase order numbers or company checks as proper reservations. We also accept American Express. INPUT reserves the right to make changes to this conference without notice.

ACCOMMODATIONS

Washington's famous Landmark Hotel, the Omni Shoreham, beautifully restored to the grand style of days gone by and uniquely located on 11 tranquil acres in Rock Creek Park in the heart of Washington, D.C., just one block from Woodley Park Metro Station, minutes from the Smithsonian Institute, museums, the Capitol, and walking distance from the National Zoo.

Hotel reservations may be made by calling the Omni Shoreham at (202) 234-0700. Be sure to ask for the INPUT Conference special rate. Available rooms may be taken quickly, so please contact the hotel promptly.

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- ☐ \$31,000 if payment received *after* December 15, 1990.

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Please enter my order as described:

U.S. Software Products Market, 1989-1994 report at the fee of \$3,000

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When You Have to Know the Specifics on the Federal Telecommunications Market...

- ◆ How big is the market and how fast will it grow?
- ◆ Which are the key buying agencies?
- ◆ What are users looking for?
- ◆ Which agencies are awarding contracts now?
- ◆ What is the competition like, and how can you beat it?

You Have to Have INPUT's New Federal Telecommunications Report!

INPUT has just published a new report on the federal telecommunications market that gives you the specific market intelligence you need to understand overall trends, identify lucrative contract opportunities, and avoid competitive pitfalls.

And if you act before January 31, 1991, you'll pay \$175 less than the regular list price for the report—a savings of 10 percent!

Federal Telecommunications Market, 1990-1995

Market Analysis and Forecast

- Federal Market Forces through 1995
- Vendor Market Share and Competition
- Technological Impacts
- Policy and Regulatory Prospects

Agency Requirements

- Key Players in Regulations, Standards, and Policy
- Agency Plans and Perspectives
- Technology Trends

Implications of FTS 2000

- Status of Cutover
- Service Scope Issues
- Agency Understanding and Acceptance
- Vendor Perceptions and Prospects

Competitive Trends

- The Marketplace
- Federal Telecommunications Vendors
- Vendor Federal Telecommunications Market Plans and Concerns
- Recommendations

Telecommunications Opportunities

- Present and Future Programs
- Recent Telecommunications Awards
- Telecommunications Opportunities by Agency

The report, entitled *Federal Telecommunications Market, 1990-1995*, offers detailed insights into where the opportunities are *today* in this kaleidoscopic market. What can you do to benefit from FTS 2000? Which agencies are buying? What market forces are working against you, and what can you do about them? The report answers all of these questions, and many more on every aspect of selling these complex products and services to the government.

Understanding Market Trends

The report first gives telecommunications vendors detailed forecasts for growth through 1995 for the market as a whole and for four major market segments: Leased Telecommunications, Professional Services, Telecommunications Hardware, and Network Services.

With this as a cornerstone, the report then builds a complete foundation for your marketing plans to help you educate agencies about your products and services, and to help you understand the many forces driving or inhibiting market growth:

- What kind of impact will FTS 2000 have on you now that it is being implemented?
- How do the standardization of GOSIP and the increasing interconnect abilities of federal systems affect the long-term prospects for growth?
- How will agencies' desires for E-mail and EDI affect prospects for real growth?
- Does the present budgetary climate affect those prospects?
- How can you minimize the impacts of lengthy acquisition processes?
- How large is the market today, and how will it change over the next five years?
- Which segments will grow fastest? Slowest?
- What proportion of the market is made up of leased telecommunications services, professional services, network services, and hardware?
- Who are the major competitors in this arena, and what are they doing right?

The report also offers an entire chapter devoted to the impacts of FTS 2000 on agency procurement plans, standards adoption, and market opportunities.

Dear Colleague:

If you are going to exploit the federal telecommunications market opportunity to the fullest, you are going to need a lot more than just the right product or service at the right price.

You're going to need information.

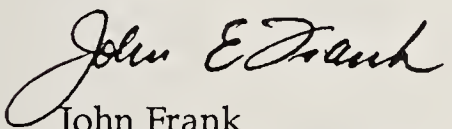
What are agencies looking for from vendors these days? How can you benefit from the implementation of FTS 2000? What are your competitors doing? Who's buying now, and what are they paying?

INPUT has just released a report designed from the ground up to give you the answers to these questions and hundreds more like them. Entitled *Federal Telecommunications Market, 1990-1995*, the report gives you something that's hard to get: competitive intelligence based on strong, first-hand data and analysis of all relevant documentary sources—public and not so public.

Why settle for less? This is the kind of competitive edge you need to sell telecommunications products and services to the government in times like these.

Get the facts. Then get tactical and strategic analysis based on years of experience in this market. Get a copy of INPUT's report, *Federal Telecommunications Market, 1990-1995*, today.

Regards,


John Frank
President, INPUT, INC.

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YES! I have to know what's going on in the federal telecommunications market. I need INPUT's report, *Federal Telecommunications Market, 1990-1995*.

I understand that I may call my order in, fax it to you at the number below, or send this form by mail. I understand that I must supply the relevant information for all three of the following sections.

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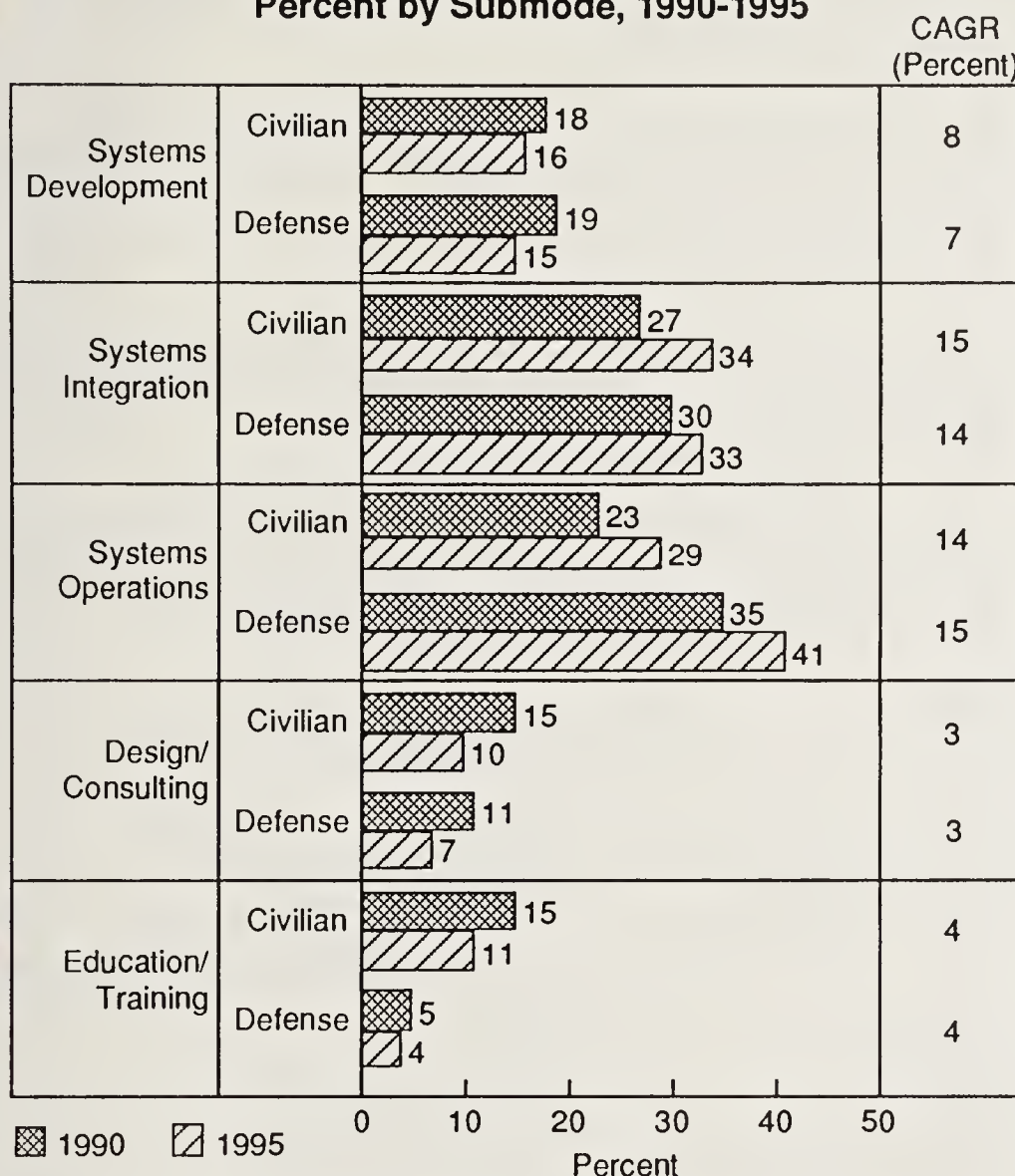
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Federal Professional Services Telecommunications Market Percent by Submode, 1990-1995



IN ADDITION TO PINPOINTING federal user requirements and contract opportunities, the report offers detailed analyses of market segments by submode, giving vendors a crystal-clear picture of where the market opportunities are.

Highlighting Opportunities

In addition to detailed analyses of the forces that shape the telecommunications markets, the report devotes chapters to addressing questions of user requirements and actual telecommunications contract opportunities that have immediate and significant impacts on your day-to-day business:

- What are the major trends in the requirements of federal users?
- Which vendor characteristics are becoming more important to users? Less important?

- Which agencies are the key telecommunications users, and what are their buying plans for the next five years?
- What will their leasing expenditures be for GFY 1990 and 1991?
- What are their preferred methods for acquiring new or enhanced telecommunications?
- What are the specific trends in spending for voice, leased circuits, VANs, hardware, and software?
- What are the 51 most recent telecommunications contract awards? Who won them? What is their dollar value?

The report also discusses other opportunities compiled from INPUT's exhaustive research into the A-11 submissions to OMB, the OMB/GSA/NIST Five-Year Plan, and documentation not generally available to the public, such as the Five-Year Defense Plan.

INPUT's research team, with decades of experience in federal telecommunications, has interviewed the major players, read the regulations, and combed the RFPs. And now they are putting the results of their labor at your fingertips in a single, concentrated volume of sharply focused research into this dynamic market

INPUT's *Federal Telecommunications Market, 1990-1995* gives you the market intelligence you need to compete successfully. Use the enclosed form to order your copy today.

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About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

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Trends in Processing Services— Western Europe, 1990-1995

THE 1990s WILL BRING A MAJOR RESTRUCTURING OF THE TRANSACTION PROCESSING MARKET.

Use INPUT's report to

- Evaluate the effect of restructuring in the market.
- Learn important country differences—essential if you are intending to set up a pan-European infrastructure.
- Discover the technological issues driving and inhibiting the market.
- Discover how end-user pressures are changing the market—essential for meeting clients' requirements.
- Find out how to adapt your service to remain competitive in the 1990s .

Despite a decline in growth rate in the processing services sector over recent years, there are still opportunities worth over \$7.8 billion.

Processing Services—A Sector Facing Change

The processing services market will undergo a major restructuring in the 1990s, and it is vital for European vendors to know what effect this will have on them, so that they can plan ahead.

INPUT's report *Trends in Processing Services—Western Europe, 1990-1995* describes the current market climate and highlights market differences in 13 European countries. These changes will affect all country markets, but will be particularly significant in Scandinavian countries where processing accounts for a relatively large market share. The market will also be affected by the impact of these changes on the captive revenues of the closed user-group processing centres in Germany and Scandinavia.

The availability of more software on faster and cheaper hardware platforms has led to a decline in the growth rate in the processing services sector of the European software and service market. However, INPUT believes that there are still significant opportunities available for vendors.

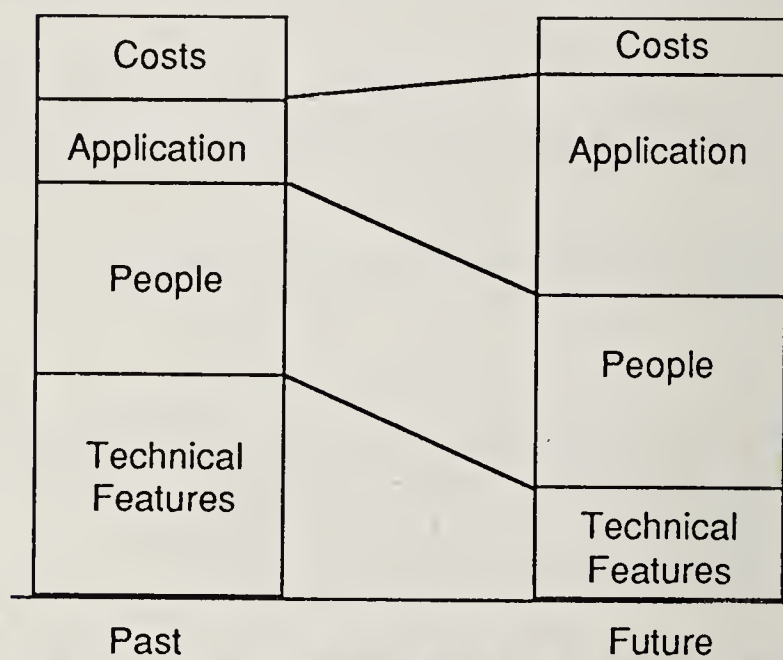
The report provides valuable guidance in a market—because of a marked decline in growth—where it is particularly important to be informed about opportunities.

INPUT's report provides the following:

- Vendor rankings according to 1989 revenues, by country
- Percentage of market share for each vendor
- Forecasts for growth—1990-1995—for Western Europe as a whole and by country

This data is invaluable for assessing the country markets that provide the best opportunities and

Evolution of Competitive Edge



for tracking competitors. The report also describes factors influencing each country market.

Service Concept

The processing services market is becoming more competitive, as vendor companies are not only competing with each other, but also with IS departments of user organisations. There have been significant changes in the processing environment from the batch processing and timesharing services of ten years ago. It is now crucial for vendors to diversify into other areas. INPUT's report discusses some specific applications and recommends strategies for extending capability into new applications—for example, how payroll processing can be developed into a human resources system.

Trends

INPUT's report discusses the technological issues affecting the market, such as:

- Cost/performance ratio of equipment
- The effect of workstations and UNIX
- The effect of higher-level languages and their potential to enable users to solve systems problems in-house.

The above issues could be viewed as threats to the processing services market. INPUT's report describes how to turn these potential threats into opportunities.

User Base

The user base for processing services is changing as a result of European deregulation—merger and acquisition activity is creating larger companies seeking larger markets and greater efficiency. Vendors are having to adapt in the same way as the client base.

Find out:

- How deregulation in Europe is affecting the user base and forcing vendors to adapt accordingly
- Whether outsourcing is a reality, or whether the reverse is true—a return to in-house processing
- Which issues vendors view as particular challenges
- The essential elements of successful transaction processing

REPORT CONTENTS

Market Forecast

- Market Size and Forces
- Regional Differences

Country Markets

- Austria
- Belgium
- Denmark
- Finland
- France
- Germany
- Italy
- Netherlands
- Norway
- Spain
- Sweden
- Switzerland
- United Kingdom
- Rest of Europe

End-User Environment

- The Service Concept
- The Changing Environment
- Service Opportunities

Applications

- Applications features and examples

Trends

- Technological threats and opportunities
- Impact of end-user markets
- Outsourcing
- Vendor challenges

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Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

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If You Compete in the Processing Services Markets. . .

- ▶ What is the market's overall size and growth rate?
- ▶ Which segments of the market are growing fastest? Slowest?
- ▶ How are user demands changing processing services?
- ▶ What successful strategies are other vendors using?
- ▶ What do their five-year financials look like?

INPUT's Processing Services Market Survey Can Give You the Edge You Need

It's a market that continues to astound the naysayers. For years, people have said processing services were dead. And for years, processing services vendors have had an unbroken record of profitable growth.

INPUT has just published a report that gives you carefully researched, up-to-the-minute information on what's going on in processing services, and how you can be sure to participate in the market's steady growth.

And if you act before June 15, 1990, you'll pay \$250 less than the regular list price for the report—a savings of 10%!

The report, *U.S. Processing Services Markets, 1989-1994*, provides in-depth analyses of the trends and market forces shaping the future growth of four different processing services markets:

- **Transaction Processing Services**, in seven of the fastest growing vertical markets: discrete manufacturing, banking and finance, insurance, medical, telecommunications, transportation, and human resources
- **Utility Processing Services**, generalized services customers use to perform a range of processing and to develop and run custom programs
- **Other Processing Services**, including specialized services like output microfilm, disaster recovery, and scanning
- **Systems Operations**, facilities management using vendor-supplied systems

For each of these service delivery modes, INPUT's survey gives a five-year market forecast, investigates the forces acting on the market to enhance or inhibit its growth, and analyzes leading vendors' product offerings, strategies, and financial profiles.

The report answers the following kinds of questions:

- What role has the demand for innovative industry-specific applications had in shaping today's services vendors?
- How is the trend toward outsourcing growing, and how can vendors take advantage of the success enjoyed by IBM, EDS, and Litton?
- Why has the development of PCs and high-powered workstations not killed demand for processing services?
- How are vendors addressing customer objections about lack of control?

<i>U.S. Processing Services Markets 1989-1994</i>
Processing Services
<ul style="list-style-type: none">• Issues and Trends• Market Forecasts• Mergers and Acquisitions
Transaction Processing Services
<ul style="list-style-type: none">• Overview• Sector Markets
Utility Processing Services
<ul style="list-style-type: none">• Issues and Trends• Market Forecasts
Other Processing Services
<ul style="list-style-type: none">• Issues and Trends• Market Forecasts
Systems Operations
<ul style="list-style-type: none">• Issues and Trends• Market Forecasts• Competitive Environment
Vendor Activities and Profiles
<ul style="list-style-type: none">• Vendor Activities• Public Company Performance• Vendor Profiles

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Dear Colleague:

Do you need intelligence on the relative size and growth rates of processing services markets, by delivery mode and market segment? Would you like to know how successful vendors are responding to the advent of ISDN, mergers and acquisitions, transborder data flow restrictions, and the looming new market for consumer processing services?

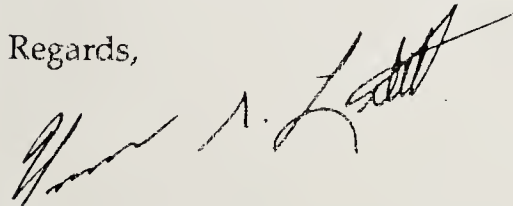
INPUT has just released the newest volume of its respected annual survey, *U.S. Processing Services Markets, 1989-1994*. The report provides processing services vendors with timely and exhaustively researched market intelligence on the trends, forces, and players shaping the future of processing services.

The report is based on interviews with more than 500 information services vendors, including nearly all of the 250 largest companies. The information in those interviews can give a distinct competitive advantage to all processing services marketers, no matter what their size, product orientation, or geographic location.

You need more than guesswork on these issues. You need hard data and thoroughgoing analysis of all the factors affecting these changing markets.

INPUT's new report offers you all of that. Order it today.

Regards,



Norman G. Litell
Director, Market Analysis Program

ORDER FORM

YES! I need a competitive edge in the processing services markets. Send me a copy of INPUT's newest report, *U.S. Processing Services Markets, 1989-1994*.

I understand that I may call my order in, fax it to you at the number below, or send this form by mail. I understand that I must supply the relevant information for all three of the following sections.

SECTION ONE: MY ORDER

Send me _____ copy (copies) of INPUT's report,
U.S. Processing Services Markets, 1989-1994.

- ☐ I want to pay \$2,250, a savings of \$250 off the regular price. I'm ordering before June 15, 1990.
- ☐ I'm ordering after June 15, 1990, for the regular price of \$2,500.

SECTION TWO: TERMS OF PAYMENT (CHOOSE ONE)

- ☐ Enclosed is my check for \$ _____ to cover the cost of my order.
- ☐ Charge \$ _____ to my American Express card:
Card # _____
Exp. date _____
Signature _____
- ☐ Bill my company for \$ _____ on purchase order number _____.

*California clients: Please add applicable sales tax on 70% of purchase price.
Connecticut clients: Please add 8% sales tax on the total amount.*

SECTION THREE: AUTHORIZATION

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Organization _____

Name _____

Title _____

Address _____

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Signature _____
(SEE TERMS OTHER SIDE)

Accepted By INPUT:

Signature _____

Name _____

Title _____

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CONDITIONS AGREEMENT

The information provided shall be used only by the employees of and within the current corporate structure of the client and will not be disclosed to any other organization or person—including parent, subsidiary, or affiliated organizations—without written consent of INPUT. INPUT exercises its best efforts in preparation of the information provided under this Agreement and believes the information contained therein to be accurate. However, INPUT shall have no liability for any loss or expense that may result from incompleteness or inaccuracy of the information provided. INPUT reserves the right to change or modify the content of the program in response to changing client requirements.

- How will international restrictions on transborder data flow affect the globalization of the processing services industry?
- Why have some vendors failed to adequately control the costs of processing services?
- How are vendors expanding their product mix to include software products, turnkey systems, systems integration, and professional services?

And more...

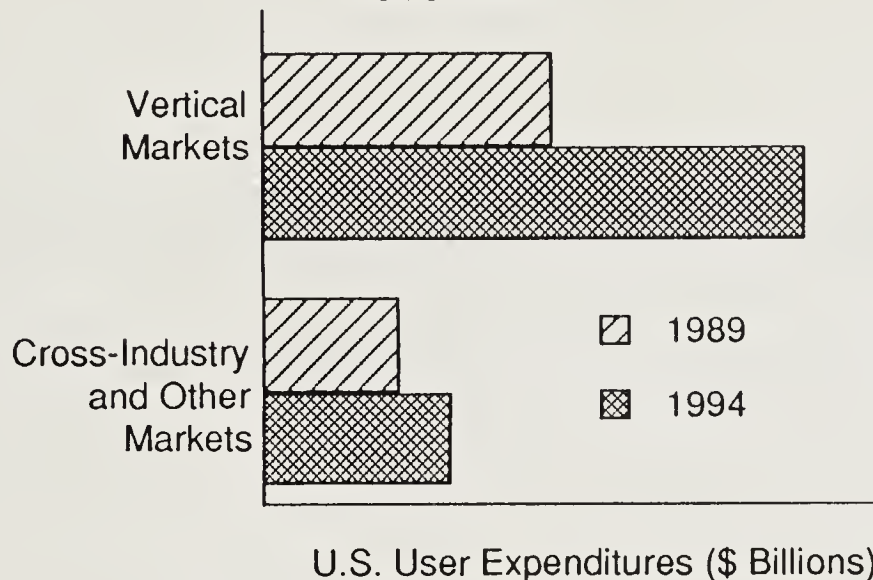
Comprehensive

In addition to thoughtful analyses of large-scale issues and market trends, INPUT's research staff spent hundreds of hours putting together one of the most comprehensive and authoritative collections of market survey data ever gathered for processing services.

INPUT's data base gives vendors a long look into how the size and growth rates of significant markets and vendors are changing, including:

- How will the annual growth percentages (nominal, deflator, and real) change over the next five years?
- How will the relative rankings of back-office processing, credit card processing, and credit authorization change in the banking industry over the next five years?
- How will the massive expenditures on turnkey systems open the market for systems operation services in the medical market?
- What are the industry and geographic markets of the largest processing services vendors?
- What are their various revenue sources?
- What are their key products and services?

Processing Services Vertical and Cross-Industry Markets 1989-1994



THE SHIFT AWAY from cross-industry processing services to services more closely targeted to specific vertical markets is clear in this graph from INPUT's newest survey of the processing services markets.

Will ISDN be a help or a hindrance to processing services providers? How can mergers and acquisitions affect your performance? How will your company exploit the tremendous opportunities afforded by consumer processing services?

INPUT's report, *U.S. Processing Services Markets, 1989-1994*, gives you the answers that can provide a competitive edge in processing services.

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Do You Need Good Information on the Network Services Markets?

- ▶ How big is the network services market and how fast is it growing?
- ▶ How have EDI, ISDN, and cellular technology altered the market?
- ▶ What are the RBOCs doing in network services?
- ▶ What impacts will high-bandwidth fiber optic networking have?
- ▶ What parts of network services are growing fastest?

INPUT's New Report Has It

The explosive market for networking and data communications services has challenged marketers for years. It's been simply too fragmented, too fast-changing, too legally and technically intricate to pin down easily.

But now INPUT, one of the most respected names in computer industry market research, has released a new survey called *U.S. Network Services Markets, 1989-1994*. The report covers the entire range of technological and market developments in network services and gives you an effective tool for gaining competitive advantage in specific network markets.

This report is the latest edition of INPUT's respected survey of this sector of the information services market.

**And if you act before June 29, 1990,
you'll pay \$250 less than the regular list price
for the report—a savings of 10%!**

The far-reaching technological developments of the last few years have made the network services market much more difficult to summarize and understand. INPUT's report gives you five different kinds of information that help you analyze the essential dynamics of the market:

- A review of driving forces and trends for three market areas: network services, network application services, and electronic information services
- Calculations of market sizes and growth rates
- Profiles of leading vendors
- An in-depth look at EDI
- A survey of electronic information services markets

Strategic Issues

The forces at work on these markets raise significant questions for vendors' present and future market position and strategies:

- How has the pressure for product differentiation affected the competitive environment, and how can you profit from it?
- How fast will the market for consumer-oriented network services evolve, and how should you respond?
- How will industry consolidation influence pricing? Competition? Product differentiation?
- What role will EDI play in the new services marketplace, and how will it affect you?
- Will the RBOCs be major competitive factors in the future? What are their strengths and weaknesses?
- How will the development of digital virtual private networks (VPNs) and metropolitan area networks (MANs) provide new product development opportunities?

<i>U.S. Network Services Markets 1989-1994</i>
Network Services Market
<ul style="list-style-type: none">• Issues and Trends• Regional Bell Operating Company Activities• Market Forecasts• Network Services Vendor Profiles
Electronic Data Interchange Market
<ul style="list-style-type: none">• Market Developments• EDI Market Forecast• Significant Events and Trends• Opportunities and Recommendations
Electronic Information Services Market
<ul style="list-style-type: none">• Market Developments• Electronic Information Services Vendors• EIS Vendor Profiles

Competitive Analysis

The report also concentrates on the particulars of network services and gives you careful market analyses, projections, and in-depth profiles of major vendors. INPUT utilizes its years of research and consulting experience to produce information that will help you answer some of the most crucial questions about these companies and new technologies:

- What parts of the market are growing fastest and how can you benefit?
- How has low-cost PC and CD ROM technology affected the market potential for on-line data base services?
- How are the largest and most successful vendors in these markets responding to market and technological change?
- How are giants like Dow Jones and Dun & Bradstreet handling the completely new challenges coming from entities like the RBOCs?

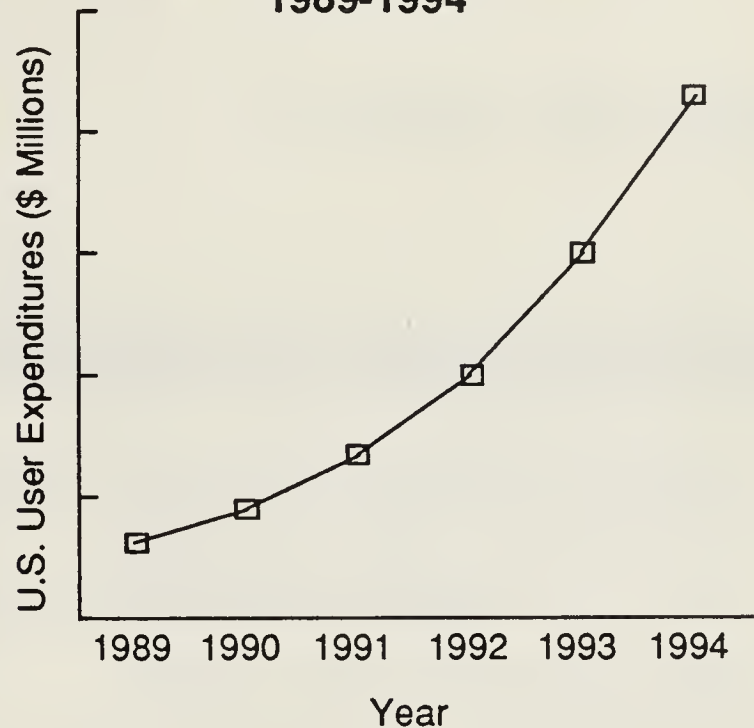
The report answers these and many other questions about issues that can have a profound effect on the most important business of all in the network services arena—*yours*.

Network services has long been touted as one of the hottest segments in the information services market, but practical and closely reasoned market analysis has always been difficult. INPUT has solved that problem, producing a report based on interviews with 500 vendors, including nearly all of the 250 largest. INPUT took that research data base and packaged it in a terse, no-nonsense report that takes a hard look at the kinds of questions you have to answer every day.

The Future of Network Services

Will remote network management services be a major delivery mode in the near future? Will network service providers feel the heat of the merger and acquisitions game? Will the hypothetical global communications infrastructure be completed anytime soon, and what kinds of product development opportunities will that infrastructure give vendors?

EDI Network Services Market 1989-1994



THE DRAMATIC RISE in end-user expenditures on electronic data interchange is evident in this graph from Chapter IV.

INPUT's report, *U.S. Network Services Markets, 1989-1994*, was conceptualized, researched, and written to give you straight answers to these questions and many others that could change the way you do business.

INPUT would like to give you a competitive advantage in one of the most competitive markets in the world.

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If You Have Questions about Success in the Turnkey Systems Markets . . .

- How are standards changing the marketing rules?
- How big are these markets? How fast are they growing?
- How can marketers avoid the commodity-pricing crunch?
- Are support services a competitive advantage?
- Which vendors are succeeding, and why?

...INPUT Can Give You the Answers!

To make the right decisions in turnkey systems markets these days, you have to have targeted intelligence on market size and growth rates, major trends, and successful vendor strategies.

INPUT's new report on *U.S. Turnkey Systems Markets, 1989-1994*, a powerful competitive weapon, gives you all of that market intelligence, and more.

**And if you act before May 15, 1990,
you'll pay \$250 less than the regular list price
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<i>U.S. Turnkey Systems Markets 1989-1994</i>
Market Size and Forecast
Issues and Trends
Value-Added Reseller Survey
<ul style="list-style-type: none">• Hardware/Software Platform Support• Selection Criteria• Platform Vendor Support Characteristics• Distribution Channel Conflict• Value-Added Product Features• Product Support Provided by Turnkey Systems Vendors• Marketing Approach• Geographical Markets• Product Expansion Plans• VAR Market Issues• Successful Turnkey Systems Strategies• Profitability and Revenue Growth• Competition
Competitive Environment
Supporting VARS
Conclusions and Recommendations

The report is a distillation of months of research designed to help turnkey systems companies shape successful business strategies by answering crucial questions about their markets:

- How large will the turnkey systems markets be in five years, and how fast are they growing?
- What are the aggregate revenues of turnkey systems vendors by company size, and what are their growth rates?
- What are the fastest growing segments of the turnkey systems markets, by mode of delivery and by product and service components? Which segments are growing slowest?
- What are the relative sizes and growth rates for industry-specific and cross-industry markets?
- Exactly how large a share of the total market is accounted for by network services? By application software? By professional services?

This market data alone would be a powerful argument for obtaining INPUT's report. But we give you even more.

Market Trends, Vendor Profiles

The turnkey systems markets have been in a state of flux recently, reacting to major technological and business trends. *U.S. Turnkey Systems Markets, 1989-1994*, tracks those trends for you, analyzing how they are developing and how they are likely to affect your business:

- Standardization has opened doors to growth, at the same time as it has put tremendous downward pressure on platform prices. INPUT examines how you can turn these contrary forces to your advantage.
- Channel conflict has become a major challenge for turnkey systems vendors. INPUT shows how some innovative lead-distribution and joint-marketing programs are turning conflicts into profitable collaborations.
- Tiered pricing offers advantages and disadvantages to almost every link in the distribution chain. INPUT analyzes the pros and cons for all parties.

- Cross-matching is one strategy for broadening your product offerings. INPUT points out some benefits, and some little-known pitfalls.

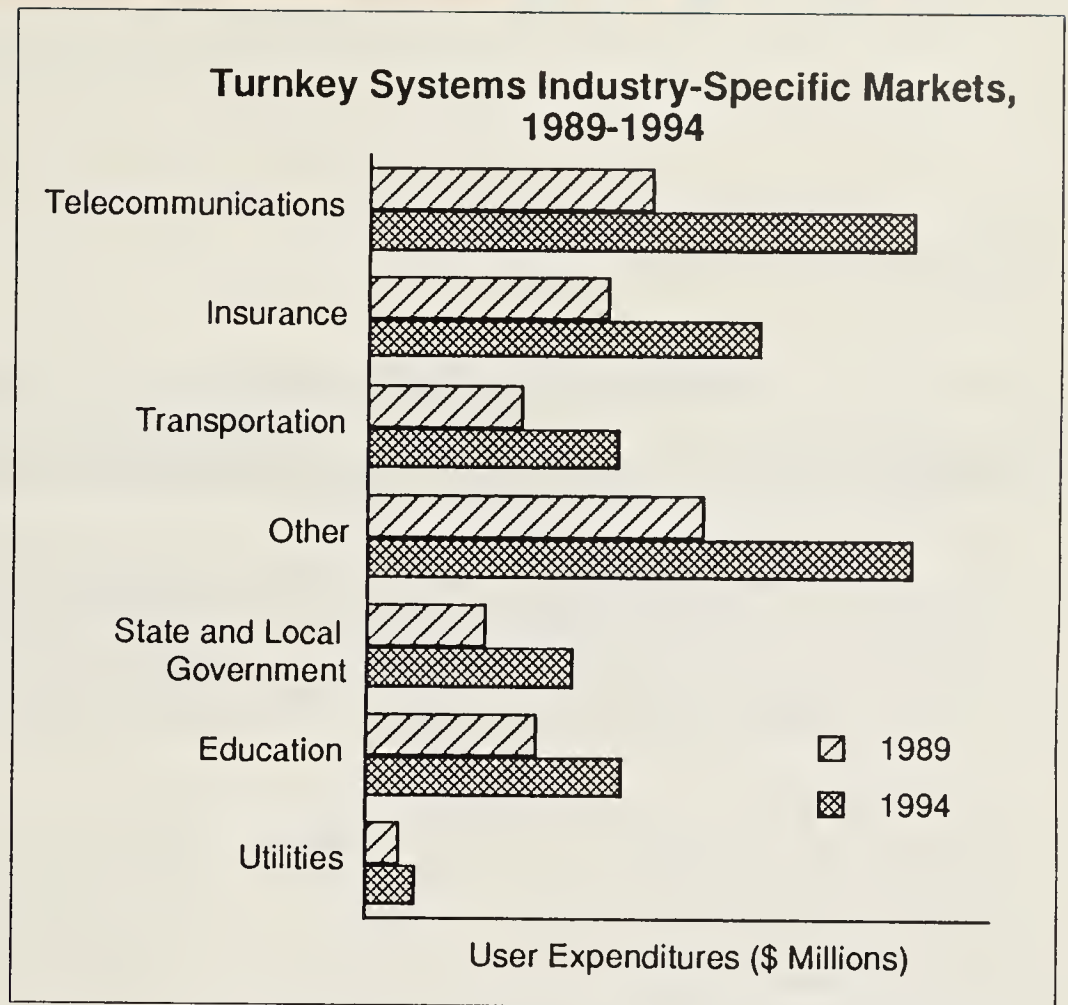
These are only a few of the trends treated in detail. Others include product and service extensions, strategic alliances, cooperation with consultants, gray market competition, and more.

In addition to market trends, INPUT's report also provides a thorough analysis of the competitive environment, including detailed analyses of the major players in the market:

- Who are the leading turnkey systems vendors?
- What strategies work best in this market for sales? For distribution?
- What do Autodesk, WordPerfect Corp., Neuron Data, Sybase, and other successful vendors have in common?
- How important are reliability, product quality, product availability, and open systems architecture for turnkey systems products?
- How have the stocks of public turnkey systems companies performed in the recent past?
- What are the products of major market players?
- What have their revenues been over the past three years?
- What are their geographic markets, their industry markets, their hardware platforms, their service and warranty policies?

And much more about the companies that in many cases are leading the changes sweeping these markets.

How those changes affect your company is up to you. You will make the decisions. How informed those decisions are will depend on the quality of the market intelligence you can get. INPUT gives you the best.



USER EXPENDITURES for turnkey systems vary widely across various industries. INPUT's report pinpoints the size and growth rates of these expenditures for you.

INPUT's *U.S. Turnkey Systems Markets, 1989-1994*, puts the resources of one of the most respected authorities on turnkey systems at your fingertips. It gives you the answers you need.

So get the market intelligence you have to have, and save 10 percent off regular list price. Use the enclosed order form to order your copy today!

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Special Report

Do You Want To Find Out How the Economic Slowdown Is Changing Your Market?

- ⇒ How has the slowdown changed companies' purchase plans?
- ⇒ How has it changed their spending plans?
- ⇒ What are the recent trends in IS budgets, by industry?
- ⇒ How should vendors and users react to the slowdown?

A **Special Report** from INPUT Details the Impacts of Economic Downturn on Your Business

Reacting to recent recessionary economic figures, INPUT has gone outside its planned research program to publish a Special Report on the likely impacts of the coming downturn.

Entitled *The 1990-1991 U.S. Economic Slowdown: Impacts on Information Systems Budgets and Spending*, the report covers in detail recessionary effects on systems and applications software; systems integration and operation; turnkey systems; and network, professional, and processing services.

The 1990-1991 U.S. Economic Slowdown: Impacts on Information Systems Budgets and Spending

Recession Impacts in General

- Organizationwide Planning and Spending
- Information Systems Budget Trends
- Forecast of Impacts on 1991 Spending
- Internal Information Systems Spending
- External Information Services Spending

Recession Impacts by Industry

- Manufacturing
- Insurance
- Banking/Finance
- State/Local Gov't.
- Distribution
- Services
- Transportation
- More...

Conclusions and Recommendations

- Implications for Information Systems Users
- Implications for Information Services Vendors

Demographics of Survey

But INPUT doesn't stop there. In a three-part organizational structure, the report first analyzes the general effects of the downturn. Secondly, it presents in-depth, industry-by-industry profiles to present a picture of the slowdown's effects on specific sectors of the economy. And thirdly, the report offers an expanded chapter containing INPUT's conclusions about the implications of a slowdown for IS users and for IS vendors.

A Substantial Savings

This report is a custom research effort designed to answer questions likely to have far-reaching impacts on how you do business. INPUT's data-gathering machinery gives you the facts you need to make informed decisions.

But you reap benefits beyond facts when you buy this report: you get the insights of industry experts who have seen, quantified, and analyzed many downturns in all relevant sectors of the economy.

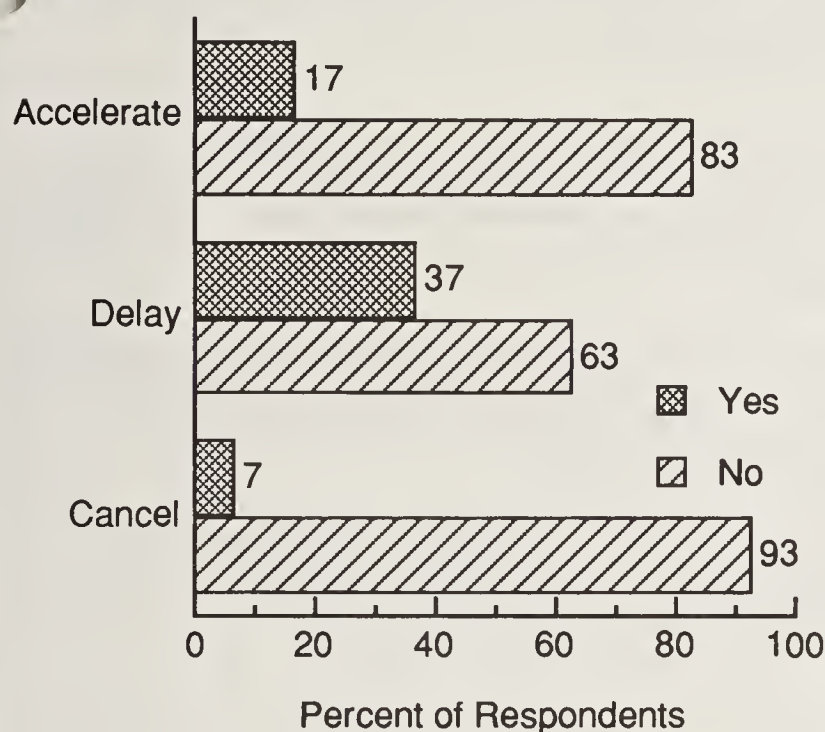
Having this data and analysis at your fingertips would be a cost-effective tool at the regular retail price of \$1,995 for the report.

But if you act before January 15, 1991, you'll pay \$300 less than that regular list price —a savings of 15 percent!

Crucial Questions

INPUT has surveyed 100 organizations in many industry sectors to ask them the crucial questions about how companies that buy information services are planning to meet the challenge of the slowdown. The report asks each of the following questions, first about the market as a whole, and then again about each major vertical industry—Banking/Finance, Insurance, State and Local Government, Discrete Manufacturing, Process Manufacturing, Retail Distribution, Wholesale Distribution, and Transportation, among others.

Recession Impact on Applications Development Plans



This research protocol gives readers an unprecedented look at the general impacts of the impending slowdown, and the more specific effects on particular markets. The questions the report asks include:

- What are the specific impacts of recession on use of external information services?
- What are the specific plans of industries to obtain information services from outside vendors in 1991?
- Are companies using recessionary scenarios in their planning?
- If a recession happens, what are the likely impacts on specific information services?
- What are the leading organization-wide spending restrictions in place now?
- What will they be in 1991?
- Are information budgets up or down, and what forces are driving the trends?
- What are the three-year trends in system budgets from 1989 to 1991? What forces are driving those trends?

- What are the significant budget changes from 1990 to 1991 in staffing, hardware, software, outside services, and telecommunications?

- How are the multiyear trends in outside services budgets dovetailing with the multiyear system trend toward downsizing from mainframes to workstation-based client/server networks?

Each of these questions is answered in two different ways: for the overall market as a whole and for eight specific industries. The result provides an unprecedented picture—in general and in particular—of how the slowdown might affect your business during the next 12 months. In short, this report offers research that can give you a tremendous competitive advantage in shaping your own plans in a troubling economic environment.

The Hottest Available Research

This report, published in December of 1990, contains information that was collected, tabulated, and analyzed in November. It therefore represents the most accurate possible portrayal of how the markets in general, and various specific industries in particular, are changing their information services purchase plans to meet the demands of a changing economic picture.

This is the hottest research available to information services users and vendors right now—because INPUT is the only company to have initiated a comprehensive crash research program about a question that could have profound impacts on every aspect of your business.

And all you have to do to put this research to work for your company is use the enclosed order form to get your copy of the report today!

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Special Report

Do You Want To Find Out How the Economic Slowdown Is Changing Your Market?

- ➡ How has the slowdown changed companies' purchase plans?
- ➡ How has it changed their spending plans?
- ➡ What are the recent trends in IS budgets, by industry?
- ➡ How should vendors and users react to the slowdown?

A Special Report from INPUT Details the Impacts of Economic Downturn on Your Business

Reacting to recent recessionary economic figures, INPUT has gone outside its planned research program to publish a Special Report on the likely impacts of the coming downturn.

Entitled *The 1990-1991 U.S. Economic Slowdown: Impacts on Information Systems Budgets and Spending*, the report covers in detail recessionary effects on systems and applications software; systems integration and operation; turnkey systems; and network, professional, and processing services.

The 1990-1991 U.S. Economic Slowdown: Impacts on Information Systems Budgets and Spending

Recession Impacts in General

- Organizationwide Planning and Spending
- Information Systems Budget Trends
- Forecast of Impacts on 1991 Spending
- Internal Information Systems Spending
- External Information Services Spending

Recession Impacts by Industry

- | | |
|-------------------|----------------------|
| • Manufacturing | • Insurance |
| • Banking/Finance | • State/Local Gov't. |
| • Distribution | • Services |
| • Transportation | • More... |

Conclusions and Recommendations

- Implications for Information Systems Users
- Implications for Information Services Vendors

Demographics of Survey

But INPUT doesn't stop there. In a three-part organizational structure, the report first analyzes the general effects of the downturn. Secondly, it presents in-depth, industry-by-industry profiles to present a picture of the slowdown's effects on specific sectors of the economy. And thirdly, the report offers an expanded chapter containing INPUT's conclusions about the implications of a slowdown for IS users and for IS vendors.

A Substantial Savings

This report is a custom research effort designed to answer questions likely to have far-reaching impacts on how you do business. INPUT's data-gathering machinery gives you the facts you need to make informed decisions.

But you reap benefits beyond facts when you buy this report: you get the insights of industry experts who have seen, quantified, and analyzed many downturns in all relevant sectors of the economy.

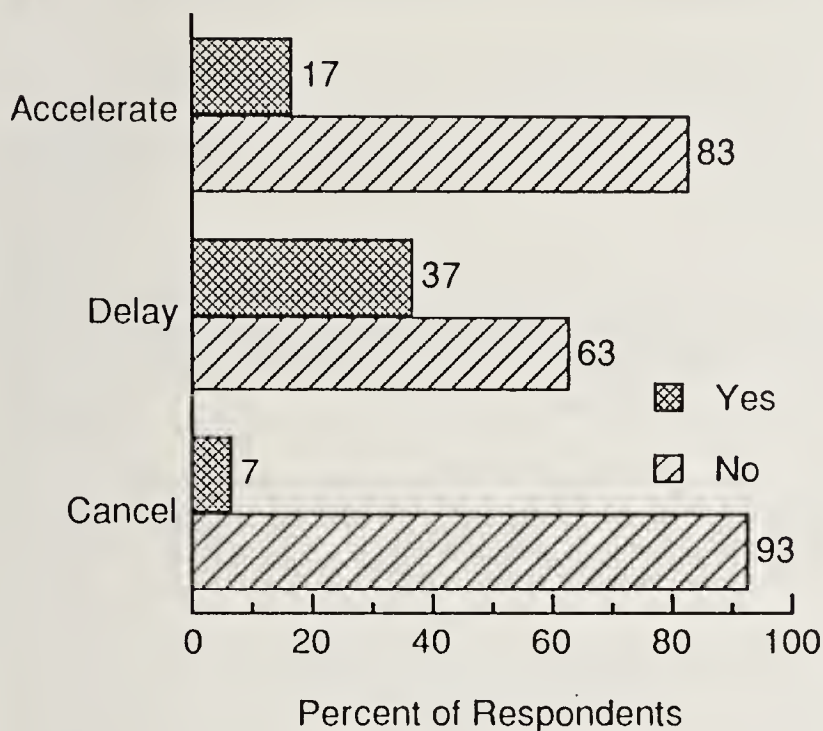
Having this data and analysis at your fingertips would be a cost-effective tool at the regular retail price of \$1,995 for the report.

But if you act before February 28, 1991, you'll pay \$300 less than that regular list price —a savings of 15 percent!

Crucial Questions

INPUT has surveyed 100 organizations in many industry sectors to ask them the crucial questions about how companies that buy information services are planning to meet the challenge of the slowdown. The report asks each of the following questions, first about the market as a whole, and then again about each major vertical industry—Banking/Finance, Insurance, State and Local Government, Discrete Manufacturing, Process Manufacturing, Retail Distribution, Wholesale Distribution, and Transportation, among others.

Recession Impact on Applications Development Plans



This research protocol gives readers an unprecedented look at the general impacts of the impending slowdown, and the more specific effects on particular markets. The questions the report asks include:

- What are the specific impacts of recession on use of external information services?
- What are the specific plans of industries to obtain information services from outside vendors in 1991?
- Are companies using recessionary scenarios in their planning?
- If a recession happens, what are the likely impacts on specific information services?
- What are the leading organization-wide spending restrictions in place now?
- What will they be in 1991?
- Are information budgets up or down, and what forces are driving the trends?
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April 1990

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Dear «GREET»

SOFTWARE AND SERVICES MARKETS - INSURANCE SECTOR

European insurance companies are being forced to fundamentally rethink their whole approach to information systems as they face up to the need to create fully electronic systems to compete effectively in the 1990s. This rethink is being driven by EEC deregulation and the competitive moves of the banking establishment into the insurance field. This is leading to increased demand for software and services which is creating opportunities for vendors offering networking services, specialised software packages and professional services.

INPUT has produced a new report which examines this rapidly changing environment: **European Software and Services Market 1990-1995, Insurance Sector**. In this report, INPUT estimates that the market for software and services in the banking sector will be worth \$12 billion by 1995.

The report provides you with:

- * Analysis of the insurance sector and the opportunities available for vendors in three areas:
 - Life
 - Non-life
 - Reinsurance
- * Market breakdown and discussion of specific opportunities:
 - By country
 - By delivery mode
- * Discussion of regulatory issues
- * Mergers and acquisitions

The activity in the insurance market will increase opportunities for software and services vendors.

11.11.11

The first part of the paper discusses the importance of the study and the objectives of the research. It also mentions the scope of the study and the limitations. The second part of the paper discusses the methodology used in the study. It mentions the data sources and the statistical methods used. The third part of the paper discusses the results of the study. It mentions the findings and the conclusions. The fourth part of the paper discusses the implications of the study. It mentions the policy implications and the future research. The fifth part of the paper discusses the conclusion. It mentions the main findings and the recommendations.

The study was conducted in a systematic and rigorous manner. The data was collected from a large sample of respondents. The statistical methods used were appropriate for the data. The results of the study are presented in a clear and concise manner. The findings of the study are discussed in detail. The implications of the study are discussed in detail. The conclusion of the study is presented in a clear and concise manner. The main findings of the study are presented in a clear and concise manner. The recommendations of the study are presented in a clear and concise manner.

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Insurance companies lag behind the banks in information systems and networks, and in order to be competitive in a single market, many alliances have been taking place. This leads to the creation of large companies offering complete financial services product portfolios.

Opportunities for vendors exist firstly to satisfy the needs of pan-European orientated companies to provide them with integrated information systems and networks. Secondly, vendors have an opportunity to provide software products and turnkey systems to increase competitiveness in local markets. Thirdly, insurance companies are looking for changes in distribution channels to improve their levels of service.

INPUT's report provides a comprehensive survey of the European insurance sector for software and service vendors. It will help you plan your future strategies whether you are already active in this market or planning to enter it for the first time. This report, available in June, is essential reading.

I look forward to hearing from you,

Yours sincerely

Carol L. Nice
Senior Marketing Analyst
INPUT LTD

THE UNIVERSITY OF CHICAGO
DEPARTMENT OF CHEMISTRY
RESEARCH REPORT
No. 1234
1955

REPORT OF THE RESEARCH GROUP
ON THE CHEMISTRY OF
THE CARBON-14 ISOTOPE

BY
J. H. COOPER
AND
R. M. FREEMAN

DEPARTMENT OF CHEMISTRY
UNIVERSITY OF CHICAGO
CHICAGO, ILLINOIS

(11)

(12)

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Insurance Sector

- ☐ £1250 if ordered by 31 May 1990
- ☐ £1500 if ordered after 31 May 1990

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Opportunities for Software and Services Companies in the Insurance Sector

Use this report to find out:

- The size of the market for software and services in the insurance sector
- Growth forecasts
- The driving forces in the market
- Insurance companies' priorities in software and services
- Recommendations for vendors

► Insurance companies to become fully electronic in the 1990s

► Huge increase in demand for software and services

Discover the Opportunities

If your company is involved in marketing software and services to the insurance sector, you will already be aware of some of the issues facing insurance companies. Changes such as deregulation, extra competition from banks and rapid technological development are giving rise to an increased demand for software and services.

However, do you know the demand for the products and services that your company provides? Are you aware of all the new opportunities that are arising?

INPUT's recent study of the insurance sector will provide you with the information you need to assess your company's position in the market.

Specifically, you will learn:

- Software and services spend in three sub-sectors:
 - life
 - non-life
 - reinsurance
- The demand for software and services for:
 - mainframes
 - minis
 - PCs
- Opportunities available for computer software and services vendors
- Country market differences

High Investment in IT by Insurance Companies

The major opportunities for software and services vendors in the insurance sector in the 1990s will stem from the insurance industry's move to become fully electronic in the 1990s. Investment in IT is running at around 15% of insurance companies' operating expenses and this is likely to increase substantially over the next five years. Many companies are finding that the packaged solutions that they currently use are not flexible enough to cope with their growing information requirements. Insurance companies are offering a wider range of services now in order to compete with banks, which are entering their markets. Also, there is still enormous scope for reducing the volume of clerical tasks.

All these factors represent significant opportunities for vendors. The more your company knows about this fast-growing market sector, the more successful it will be in taking advantage of these opportunities.

Insurance companies do not only require systems to carry out basic functions such as claims registration and acknowledgement, third-party instructions, and claims payments. There are also a number of 'internal consumers' of technology, whose needs the report also addresses. An insurance company or broker deals with a number of different business areas, and as a result needs statistics to monitor trends.

DEPARTMENT	INFORMATION NEEDS
Corporate Management	<ul style="list-style-type: none">• trends in complaints• renewal trends• average time between notification and settlement
Underwriters	<ul style="list-style-type: none">• targeting specific groups• marketing profiles
Marketing Department	<ul style="list-style-type: none">• current client profiles• new service opportunities

INPUT's Research Studies

Yes!

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*European Software and Services Market, 1990-1995
Insurance Sector report at the fee of \$2,250*

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Demand for Services in a Fragmented Market

The Western European insurance market is very fragmented, and in order to survive in a single competitive market, many companies have been forming alliances. This fragmented market means that the software and services market has distinct national characteristics, and INPUT's report will help you identify them.

INPUT predicts that there will be enormous demand for a variety of software and services in the insurance sector over the next five years, and these are summarised below:

KEY AREAS

- Systems and network integration
- Artificial intelligence
- Expert systems
- Network services
- PC software
- Turnkey systems
- Application development tools

If your company is active in any of these areas, INPUT's report will assist you in applying them to the insurance market.

Report Contents

Insurance Industry in Europe

- Life
- Reinsurance
- Market Factors

Single Market—Fewer Players

- Regulatory Environment
- Country Markets
- Strategic Positioning
- A Growth Market
- Mergers and Acquisitions

Country Markets

- France
- U.K.
- Germany
- Italy
- Spain

Delivery Modes

- Processing Services
- Network Services
- Software Products
- Professional Services
- Systems Integration
- Turnkey Systems

User Profiles

User Issues

Conclusions and Recommendations

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Optimize software product strategy through targeting growth market opportunities...

U.S. Software Products Market, 1989-1994

Current and Prospective Software Vendors:

- FORECAST your potential market for the next five years
- MAXIMIZE YOUR R&D by focusing on the higher growth product opportunities for the 1990s
- INCREASE YOUR MARKET SHARE by effectively restructuring your software product strategy
- COMPETE SUCCESSFULLY by assessing your competitor's software strategies
- IDENTIFY candidates for potential alliances and/or mergers and acquisitions
- STAY AHEAD by evaluating emerging technologies for incorporation into an integrated product strategy
- EVALUATE current software market issues for possible weaknesses in product positioning

CA, Sybase, Ingres,
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Information That's CRUCIAL for Software

INPUT'S *U.S. Software Products Market, 1989-1994* forecast is based on a survey of over 500 of the larger vendors of software products and in-depth discussions with over fifty company executives on trends and issues impacting the software products industry. In addition, research results from INPUT reviews of fifteen industry-specific and seven cross-industry markets, based on interviews with leading vendors and end users, are incorporated into this annual study of the U.S. software products industry.

Both vendors and users can benefit from the analysis of the software products—market size and growth rates, market trends and issues, and the changing competitive environment—featured in this report.

The U.S. software products market is maturing, reflected in slowing annual growth rates. The adjustment to a slower growth environment is being complicated by the requirements for increasing product complexity, global market positioning, and accelerating rates of software product obsolescence.

The content of the report addresses the following questions related to the structural changes of the software products industry.

What are the largest application software products markets, and what markets represent the higher growth opportunities?

Much of the historical product development emphasis in the software products industry was on cross-industry (horizontal) solutions. Certain of these cross-industry markets now represent the larger, more mature software product sectors. However, there are still high growth market opportunities in several of the cross-industry sectors, which are identified in the report.

Industry-specific (vertical) software products markets are receiving considerable attention, particularly from the large computer systems vendors, as part of a total solutions marketing strategy. Many vertical markets represent smaller niche market segments. The larger, faster growing vertical markets, which can provide sustained longer term growth, are highlighted in the report.

Why will the systems software products market reflect a higher growth rate than the application software software markets in the 1990s?

The application development tool market is projected to represent major product opportunities in the 1990s for independent software vendors, computer systems vendors, and professional services companies. The ability to develop quality software in a cost competitive manner will be a major factor for success in the software products markets of the 1990s.

CASE, image processing, and voice recognition all represent technologies in early stages of development, with large market potential over the next ten years.

Why should many software products companies have formal alliance and mergers and acquisitions programs?

The software products industry is undergoing major structural changes which will continue well into the 1990s. These relate to the maturing of particular market segments, accelerated R&D cost stemming from the increased product complexity of an integrated product requirement, and the rapid rate of change in hardware technology which is accelerating the pace of software product obsolescence.

Also, the relative performance of the high technology sectors in recent years versus the broader market indexes reflects investors' perceptions of the maturing of this industry. The ability to raise capital for both new and mature software products companies through the traditional public markets has become much more difficult since the stock market 'crash' of October 1987.

Increasingly, software company managers will be required to look to alternative methods for leveraging their technology, including marketing relationships and obtaining equity from nontraditional market sources.

In addition, the larger computer systems, professional services, and non-industry companies with strong financial and marketing capabilities are becoming much more aggressive in the software products markets. This is increasing the level of competition.

Optimize software product strategy by targeting growth market opportunities

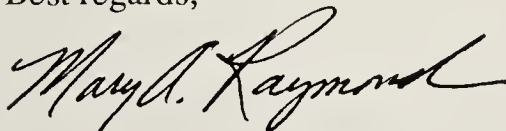
The U.S. software products market overall growth is projected to slow modestly over the next five years as the industry continues to show signs of maturing. However, INPUT projects that this market will continue to provide strong growth opportunities in many software market sectors.

INPUT projects that the systems software products market, in particular, will provide a number of high-growth product opportunities.

The just-completed *U.S. Software Products Market, 1989-1994*, focuses on the reasons behind the slowing growth rate, identifies the product and market areas expected to provide the highest growth rate potential, and discusses strategies for maximizing growth opportunities within these software product markets.

To receive your copy of this pivotal report, please mail or fax the enclosed order form, or call INPUT at (415) 961-3300.

Best regards,

A handwritten signature in black ink, reading "Mary A. Raymond". The signature is fluid and cursive, with the first letters of each name being capitalized and prominent.

Mary A. Raymond
Senior Consultant

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Success in the 1990s

The report outlines approaches for both independent software developers and computer systems vendors to maximize product opportunities within this changing environment.

<i>U.S. Software Products Market, 1989-1994</i>	
Market Size and Forecasts	
<ul style="list-style-type: none"> • Overall market, 1989-1994 • Applications software <ul style="list-style-type: none"> - Overall market size and growth - Industry-specific applications market - Cross-industry applications market - Leading applications software products vendors 	<ul style="list-style-type: none"> • Systems software <ul style="list-style-type: none"> - Market size and growth by principal sub-delivery modes - Leading systems software products vendors • Market forces • Market opportunities
Issues and Trends	
<ul style="list-style-type: none"> • Software products technology/market trends <ul style="list-style-type: none"> - Client/server implementation - Application development tool technology - Voice recognition - Image processing/document management - Multimedia applications - Mergers and acquisitions - Alliances - Standards - Project management software - Decision support systems/executive Information systems 	<ul style="list-style-type: none"> • Principal software industry issues <ul style="list-style-type: none"> - Migration - Standards - Multi-platform support - Product obsolescence - Downsizing - User confusion - Return on investment (ROI)
Competitive Environment	
<ul style="list-style-type: none"> • Software markets structural change • Competitive strategies 	<ul style="list-style-type: none"> • Software company profiles

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Identify today the opportunities for professional services in the 1990s...

U.S. Professional Services Market, 1989-1994

Current and Prospective Professional Services Vendors:

- FORECAST efficiently your potential market for the next five years
- INCREASE your market share by effectively updating your professional services strategy
- DEVELOP your successful professional services image based on your customers' requirements
- COMPETE successfully by assessing your competitors' professional services strategies
- IDENTIFY partners for professional services projects
- VALIDATE your strategic marketing and development strategies

IS Managers and Buyers of Professional Services:

- STAY AHEAD by evaluating how future professional services trends will benefit you

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Valuable Information for Professionals

Challenges in professional services include:

- Identifying, attracting, and retaining technology experts
- Increasingly sophisticated buyers of services
- More mergers and acquisitions
- Changing information systems market structure

Both vendors and buyers need the right answers now to these urgent questions.

U.S. Professional Services Market, 1989-1994

Market Size and Forecasts

- Structure of professional services market
- Market size and growth rate, 1989-1994
- Largest markets
- Leading vendors
- User expenditures by functional area
- User expenditures by customer size
- Market driving forces
- Growth inhibitors
- Market opportunities

Issues and Trends

- Changing buyer focus
- Competitive pressures
- Increasingly complex solutions
- Changing senior management view of IS
- Shortages in certain skills
- Consolidations and alliances
- Full service suppliers
- Changing information systems market structure
- Internationalization

Competitive Environment

- Company description and background
- Key products and services
- Industry markets
- Geographic markets
- Computer hardware and software

What's the major trend?

Buyers focusing on core business applications? More users becoming buyers of information services? New technology applications? Vendor focus on repeatable solutions? More competition? Validating, assessing, and evaluating current strategies against future trends will optimize your company's opportunities in the 1990s.

What vendor alliances and joint ventures have the greatest influence?

INPUT identified more than two dozen key alliances and joint ventures between professional services vendors. Which vendors have been most active in creating alliances? What are the reasons behind these flexible alliances? What is the role of IBM's investments in professional services and software products vendors?

What's the size of your potential market?

Vendors need accurate information before creating effective strategies. To help with the analysis, INPUT segmented the professional services market into four components:

- Software development
- Consulting
- Education and training
- Systems operations

INPUT determined the size of the professional services market through comprehensive user and vendor interviews and in-depth market intelligence. The report includes valuable user expenditure data by:

- Size of organization within vertical sectors
- Business functional area

Identify today the opportunities for professional services in the 1990s

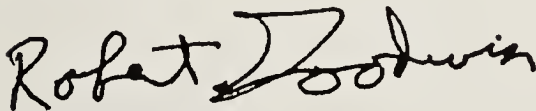
Professional services, now the second-largest segment in the U.S. Information Services Industry, affects every user and vendor organization. INPUT's forecast for the next five years calls for this market to maintain its double-digit growth, despite a number of dampening influences.

The just-completed *U.S. Professional Services Market, 1989-1994* report focuses on:

- Reasons behind this growth
- Demand inhibitors
- Key trends and issues
- Leading vendors
- Opportunities for buyers and vendors

To receive your copy of this important report, please fax the enclosed order form to (415) 961-3966 or call INPUT at (415) 961-3300.

Sincerely,

A handwritten signature in black ink, reading "Robert Goodwin". The signature is fluid and cursive, with the first name "Robert" and last name "Goodwin" clearly legible.

Robert Goodwin
Vice President

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Services Success in the 1990s

“INPUT’s *Professional Services Market, 1989-1994* includes primary research and provides you with the information you need most to succeed in the 1990s.”

Which classes of vendors offer professional services?

More than just computer equipment manufacturers and traditional professional services vendors now offer professional services. Find out the major vendors of professional services in each of the following categories:

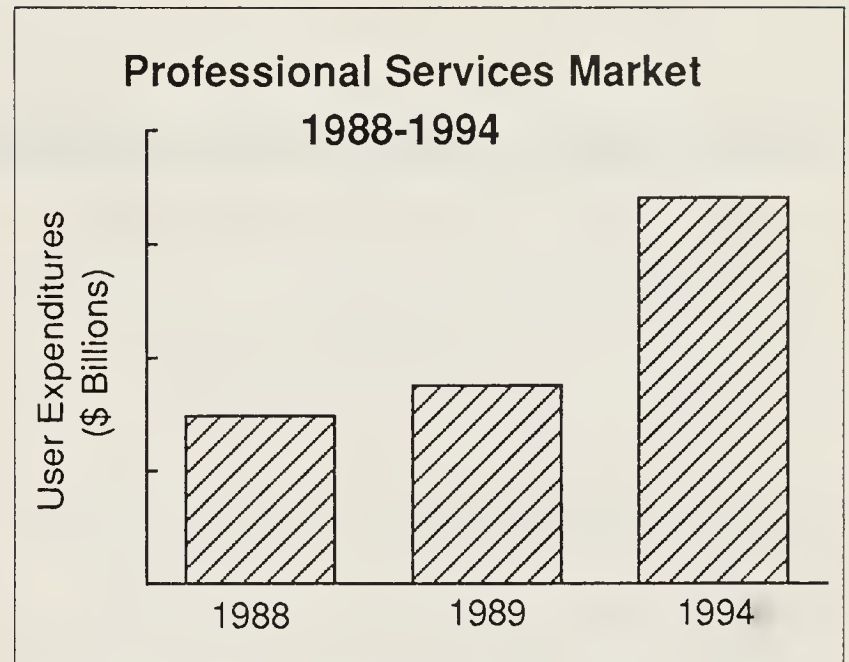
- Software products
- Public accounting
- Turnkey systems
- Manufacturing-based spinoffs
- Processing/network services
- Non-U.S. vendors
- Not-for-profit organizations
- Management consulting
- Temporary personnel agencies
- Telecommunications

We’ve Got the Answers!

INPUT’s *U.S. Professional Services Market, 1989-1994*

Strategic Information You Need TODAY
for Professional Services Success
Tomorrow

What's the major trend in professional services?



Base your strategy on knowing:

- Key professional services market segments
- The size and growth rate of each market segment
- Leading vendors

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If You Need the Best Available Analysis of Executive Information Systems Today . . .

- ▲ What are the New Ten Commandments of EIS?
- ▲ Who are the major players?
- ▲ What are the technological trends?
- ▲ How big is the market?
- ▲ How do you succeed with EIS?

... INPUT Can Put that Analysis at Your Fingertips Now!

A new INPUT report on Executive Information Systems clarifies the emerging opportunities and tremendous potential in this new, fast-growing, and sometimes confusing market.

And if you act before December 31, 1990, you can have the report for \$60 less than the regular list price—a savings of 10 percent!

Executive Information Systems (EIS) are the vendor community's attempt to storm what has been a citadel of computer resistance—executive desktops.

The technological foundations of EIS have changed dramatically, with mainframe systems being supplanted by personal workstations, local and wide area network capabilities, and relational data bases with high-level programming tools. But the goal has remained essentially the same: to provide executives who are essentially computer illiterate with a flexible, easy-to-use tool for rapid, ad hoc access to information of all kinds.

Developments in Executive Information Systems

EIS—Past and Future

- Prior to 1990
- EIS—A Definition
- After 1990

The User View

- Demographics
- Status and Activity
- Lessons Learned
- Planning for the Next Wave
- The Value of EIS

The Vendor View

- Market Structure
- Key Software Vendors
- The Changing Market
- Market Forecast

Conclusions and Recommendations

EIS Answers

With INPUT's report on *Developments in Executive Information Systems*, users and vendors now have access to the results of a months-long, in-depth research effort designed specifically to determine the exact characteristics of the EIS arena, and how you can shape your development or marketing efforts to take advantage of the opportunities emerging there.

The report analyzes the following questions in detail:

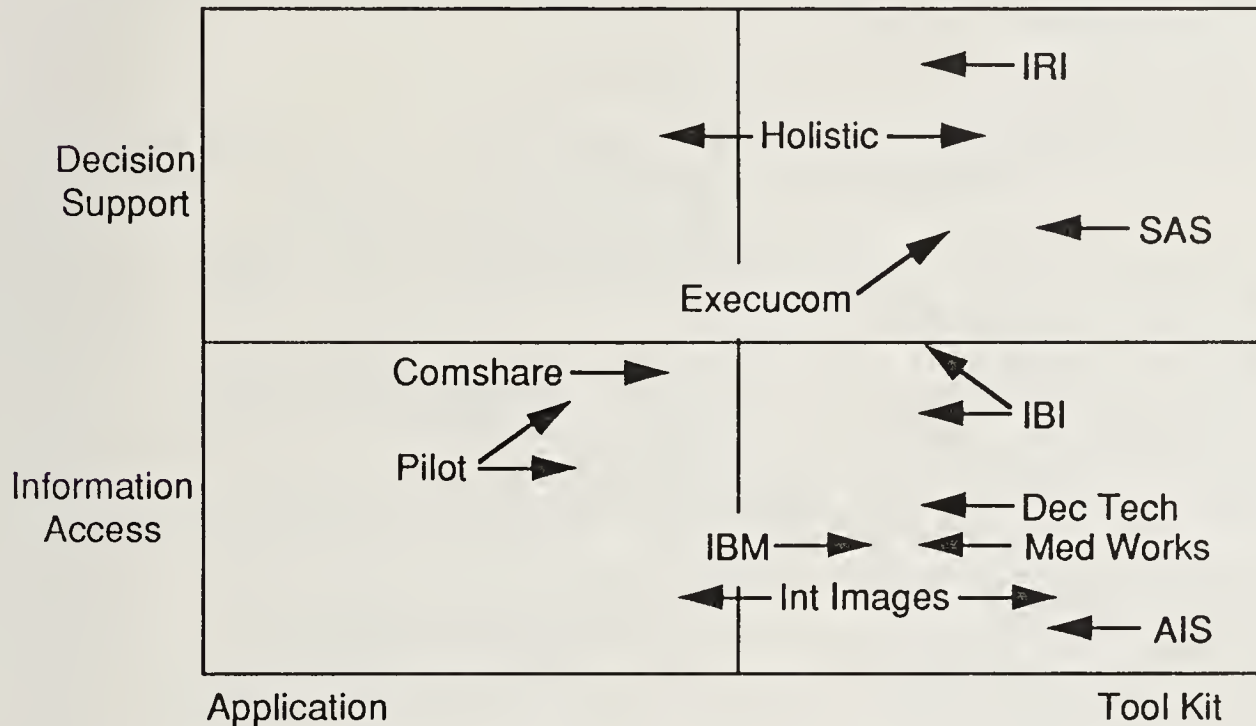
- What are the new Ten Commandments of EIS development and marketing?
- Who are the new sponsors of EIS development, and who makes the purchase decisions?
- What are the relative degrees of importance given by users to 13 different subapplications and categories of data in EIS?
- In what specific ways does EIS differ from traditional systems, and how can you exploit those differences?
- What types of users are in the wings, how should you plan to meet their needs?
- What do users and sponsors say they want out of EIS?
- What job titles and functional areas use EIS today? How will that change over next 18 months?
- What is the relative importance of the goals of timeliness, quality of information, support of management process, and use of information technology, according to executive users?
- What are the typical development times for EIS?
- What is the initial total investment, including software and staff?
- Where are the trendlines headed in pricing?

INPUT answers these and many of the other questions that will have a direct, practical bearing on your success in penetrating this final frontier of corporate computer use.

An Invaluable Guide

In addition to these specific issues, INPUT focuses its research in this report on some of the broader questions surrounding Executive Information Systems. The EIS market is in a constant state of upheaval because of the rapid technological developments that continue to change the basic platform, and because in the final analysis, EIS must be constantly adapted to fit the requirements not of classes of users, but of individuals.

EIS Software Vendors Classification and Direction



THE FOCUS AND DIRECTION of the various major EIS vendors is instantly discernible in this diagram from *Developments in Executive Information Systems*. This is the kind of information that the report supplies on vendor analysis, product analysis, market analysis, and other issues central to your success.

Developments in Executive Information Systems is an invaluable guide for vendors who need to understand the root causes of the market's changes, and how they can capitalize on them; and for users who need to understand the obstacles to EIS implementation. To determine where the technology is headed, INPUT deployed the resources of extensive mail surveys, broad telephone polls, and in-depth, focused telephone interviews of key participants. These survey results answer the following strategic questions:

- How is EIS technology changing? How does EIS compare to generalized cooperative processing?
- What is the size of the EIS user population within the typical company, and how will that change over the next five years?
- What are the obstacles to EIS success and how can they be overcome?
- How big is the EIS market now? How big will it get over the next five years? What are the compound annual growth rates of its components?
- How will the professional services component of EIS change over time, both in dollar value and in terms of the types of services required?
- Who are the key software vendors in this market? What are their products? Where are they positioned in the market? What are their strategies for increasing share?

Your Advantage

The EIS game has definitely changed. It is now a significant market, and it also shows definite potential to grow dramatically over the next five years. The EIS users who see the bigger picture; and the EIS vendors who shape their product and service offerings to take advantage of this bigger picture, are the ones who will succeed.

Be one of them. Order your copy of INPUT's *Developments in Executive Information Systems* today!

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Are You Ready for Outsourcing?

- ◆ How can you make the Go/No Go decision?
- ◆ What are the rewards? The pitfalls?
- ◆ How big is the market?
 - ◆ What kinds of companies have succeeded best?
 - ◆ How should you structure outsourcing relationships?
 - ◆ How will outsourcing change your organization?

Get Ready—Get the Answers— With INPUT's New Report!

The potential rewards of outsourcing are tremendous. But so are the risks. A new report from INPUT entitled *Information Systems and Outsourcing—A Strategic Assessment* puts outsourcing in perspective by giving IS management and vendors a crisp analysis of risk and reward potential in the context of today's information environment!

Analyses of the major outsourcing vendors, the increasing role of professional services, contract and personnel pitfalls, market size and growth rates, and a comprehensive conceptual framework IS management can use to evaluate outsourcing on a case-by-case basis—these are all provided by INPUT's report. But the report also covers a

historical perspective on outsourcing, major market forces, vendor selection criteria, organizational impacts, analyses of vendors and their strategies, and more.

And if you act before December 14, 1990, you'll pay \$150 less than the regular list price for the report—a savings of 10 percent!

There is no question that outsourcing represents a major shift in focus for both vendors and users. The only question is who will benefit most. We believe that to exploit the outsourcing opportunity requires the most comprehensive information and the best analysis available. *Information Systems and Outsourcing—A Strategic Assessment* is researched and written to give you exactly that.

Information Systems and Outsourcing A Strategic Assessment

Outsourcing—Past and Present

- A Historical Perspective
- What Is Different
- A Working Definition

Information Systems Perspectives

- Driving Forces
- IS Organization in the 1990s
- Information Systems Strategy and Outsourcing
- Outsourcing Opportunities

Outsourcing and Vendor Capabilities

- Vendor Categorization
- Systems Operations and Systems Integration
- Vendor Support for Organizational Issues
- Vendor Capabilities
- Outsourcing and Systems Management

Outsourcing—Decision and Selection

- Outsourcing Decision Factors
- Client/Vendor Relationship
- Vendor Selection
- Managing the Vendor
- Organizational Impacts
- Insourcing
- Information Systems Outsourcing Benefits

Conclusions and Recommendations

Adding Value

Ever since Kodak contracted out for the majority of its information systems function, companies have been wondering how they might reconfigure their IS effort to allow them to concentrate on the area where they add the most value: the architecture, planning, and implementation of strategic systems. INPUT's report tackles that issue, along with others like:

- What are the key benefits to be derived from the five basic categories of outsourcing?
- What are the various types of outsourcing relationships and what are their advantages and disadvantages?
- What are the pitfalls in managing the ongoing vendor relationship?
- What are the key factors in analyzing whether you should outsource?
- What kind of organizational impacts can you expect from an outsourcing relationship?
- How can you define *business* objectives for outsourcing relationships?
- How can you structure these agreements to give your company the greatest possible benefit?
- How can you resolve the inherent conflict in the perspectives of the organization and the IS department?
- How will the major market forces of globalization, increasing rate of business change, and specialization affect the outsourcing trend?

In short, INPUT's report examines all of the pressures related to outsourcing, and analyzes in detail how they are likely to transform the IS organization in the 1990s.

The Vendor View

But INPUT does not stop there. Our researchers also provide valuable information on outsourcing vendors, the market they play in, and how their product and service offerings are being forced to evolve. The report answers your questions about:

- How big is the market now, how fast is it growing, and how big will it be for each of the next five years?
- What are the outsourcing strategies of eight key competitors in this field?
- How do outsourcing buyers rate various vendor capabilities in order of importance?
- Where are the best outsourcing opportunities today? Where will they be in the near future? What are the forces driving the market in that direction?
- What types of outsourcing relationships are becoming common among users and vendors?
- How is the willingness of users and buyers to make longer-term commitments to outside vendors for larger contracts affecting the outsourcing market?

And other questions you have to have answered if you are going to be able to shape your business so that you can reap outsourcing's rewards.

Clear, Practical Recommendations

Never has an issue had so much potential to change the way you do business. Never has an issue involved so many different aspects of information management. Never has an issue carried so many possible benefits, or had the potential for negative impacts.

Outsourcing Benefits

Outsourcing Category	Benefits						
	Costs		Skills Access	Rapid Response	Use of Skills		Management Time
	Oper.	Cap.			Vendor	IS	
Applications management	X	X	X	X	X	X	X
Systems operations	X	X	X	X			X
Transition management			X	X	X	X	X
Applications maintenance	X			X		X	X
Systems integration			X	X	X		X

THE FIVE BENEFITS of outsourcing are used to form a matrix with the five different outsourcing categories to help IS management determine where the best opportunities lie for their companies.

Outsourcing is unique. And you can't just ignore it. IS managers and vendors are going to be forced to make a conscious decision on what to do about outsourcing.

That's why INPUT's report on *Information Systems and Outsourcing—A Strategic Assessment* can be so valuable for you. We put all of the resources of our sophisticated research infrastructure behind the effort to come up with information on this subject. And then we put some of the finest minds in the business to work on it to come up with incisive analysis and clear, practical recommendations for action.

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Gain Insight Into Key Trends in the Management of Information Systems in the 1990s...

The Future of Information Systems Management

Read this report if you are:

■ A chief information officer who is

- An end-user responsible for information distribution
- Considering electronic information options in the enterprise
- Needing to understand the technology changes affecting operations
- Looking to have an understanding of the differing organizational structures and responsibilities of information systems during the 1990s

■ A hardware, software, or professional services vendor that is

- Participating in or considering entering the systems integration/operations market
- Responsible for industry market/systems/service development

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Understand the Impact that New Technologies Will Have on the Role of Information Systems...

Since the early 1980s, there has been a growing thrust within information systems organizations to become more involved in the strategic direction of the enterprise. Once a servant of the corporation, information systems have now been placed, or at least identified, as a critical factor in the success of the enterprise. INPUT has undertaken a study to gain a realistic view of the role of the information systems function, and especially the CIO (Chief Information Officer), to the business enterprise.

INPUT has conducted a series of recent projects, including:

- INPUT/Andersen Consulting CIO study
- INPUT's annual user survey of 250 IS executives
- INPUT/POSP (profit-oriented systems program) joint study
- A number of consulting engagements to analyze the information systems functions in specific organizations

INPUT has concluded that the role of the information officer is, or should be paramount in supporting business goals.

As revealed in the study, the qualifications of the successful information officer of the 1990s should include:

- Intuitive understanding of business/technology relationship
- Managerial perspective
- Business orientation
- Excellent staff support

Differentiation of the CIO role within diverse industries is also explored. Analysis indicates that the actual division of responsibilities between corporate and distributed systems is dependent on whether the organization is, for example:

<u>Orientation</u>	<u>Industry</u>
Information-oriented	Bank and finance Insurance Telecommunications
Service-oriented	Retail/wholesale distribution Transportation Utilities Medical
Product-oriented	Discrete manufacturing Process manufacturing

The Future of Information Systems Management

The Role of the CIO

- The CIO's objectives
- Qualifications
- Critical success factors

IS Role Structure

- IS responsibility framework
- Impact of industry focus
- Product orientation

Business and Technology Trends

Future of the Information Systems Function

- IS organizational structures
- Network Environments in the 1990s
- Development Environments in the 1990s
- Role of the information services vendor

THE FUTURE OF INFORMATION SYSTEMS MANAGEMENT

Because of its leadership and expertise in research into the information needs of leading-edge corporations, INPUT has released this report, *Future of Information Systems Management*. This report supports the critical requirement of organizations looking to the IS group to provide the capability to solve competitive attacks to the business enterprise. This study will:

- Provide an understanding of the organizational structure and strategic responsibilities of the information system function during the next decade
- Discuss emerging technologies that will create new kinds of strategic applications
- Analyze opportunities in out-sourcing to provide full-solution data center management and distributing operations to allow for a focus on strategic applications
- Discuss the need for a more flexible organization to address the globalization of business activities

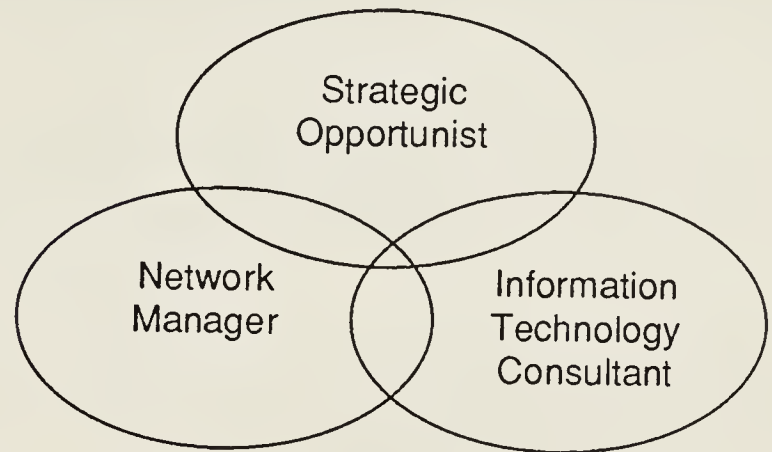
Four key areas are scrutinized:

- The role of the CIO
- Industry differentiation
- Business and technology trends
- Forecasting the future

In addition, the roles and responsibilities of information systems officers have been scrutinized as to the product or service, including:

- The involvement in enterprise planning
- The ability (responsibility) to formulate policy

Information Systems Executive



An Internal "Systems Integrator"

The changing role of the IS executive is suggested by the above graph. INPUT's report analyzes the importance of this role for the flexible, global, and responsive corporation of the 1990s.

Although factors such as corporate culture, product technology, and organizational philosophy have an enormous impact on the strength of the IS organization, INPUT believes that all-told the role of the IS organization will be dominant in the progress of the enterprise.

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How Will You Manage Data Effectively in the 1990s . . . ?

- ◆ How is RDBMS technology changing IS operations?
- ◆ How can you manage these changes? How will you address integrity and security issues? How will CASE affect you?
- ◆ How will the end user's increasing role affect you?

INPUT's New Report Tells You How!

Corporate data is a strategic weapon. If you want targeted intelligence on how changes in data management are changing the way you can use that weapon—and how it can be used against you—you need the best research you can find. You need INPUT's newest report on the world of data management.

Entitled *Data Base Systems Development*, the report addresses the changes sweeping the entire field of data management, showing how those changes will affect how you do business, and offering clear and concise recommendations for future action.

The report is based on a research effort that consumed hundreds of man-hours and tens of thousands of dollars. It is normally priced at \$2,000.

But if you act before August 15, 1990, you'll pay the special price of \$200 less than the regular list price for the report—a savings of 10 percent!

For this comprehensive overview and analysis, INPUT interviewed data base managers in Fortune 500 companies to find out directly the current status of data management organizations, DBMS environments, application development, and end-user roles.

This information is not theoretical. It is derived from direct interviews with the people in the data management trenches today. They know how changes in data management will affect your operations, because they're living through those changes in their own operations right now.

INPUT gives you the benefit of their hundreds of man years of experience to help you navigate one of the fastest changing fields in American business today. The report offers insights into how changes in data base management can affect you, including:

- How the overall strategy and direction of information systems in general, and data base management in particular, has serious implications for the scope of your responsibilities.
- How to approach concerns about the security and integrity of data files in a data environment rapidly changing over to distributed data base technology.
- How to decide when to make major technological investments in a market with some of the shortest product life cycles in the industry.
- How to accommodate increasing demand for data access, no matter where or in what format the data resides.

<i>Data Base Systems Development</i>
Data Administration: Current Environment
<ul style="list-style-type: none">• Background• Changing Environment• Effectiveness of Data Administration• Changing Role• Key Issues
Impacts of Relational Data Base Technology
<ul style="list-style-type: none">• Status of Relational DBMS Use• Impacts of RDBMS on Data Administration• RDBMS and the End User
Impact of Other Technologies
<ul style="list-style-type: none">• Distributed Data Base Technology• Impact of Network Growth• Role of the Data Dictionary• Data Administration and CASE
Data Management: Future Environment
<ul style="list-style-type: none">• Data Management's Role in the Organization• Roadblocks to Success• Planning for the Future
Conclusions and Recommendations

And more. The advent of relational data base technology has had a major impact on traditional data management techniques. And that impact has been amplified by the increasing availability of this sophisticated technology on every conceivable kind of computing platform—not just mainframes, but on departmental minicomputers and on desktop systems.

How do you deal with these changes?

How can you turn them to your advantage?

How will you be able to use the evolution of traditional data management roles to redefine the role of Information Systems?

INPUT's report is a comprehensive examination of data management designed to help you do just that. It investigates in detail the questions that you are facing every day, and gives some straightforward recommendations on how to answer them:

- How do you best manage distributed data?
- What are the respective responsibilities of users and IS management for ownership of this data?
- How can you play a central role in managing both technology and growth?
- How do you plan for new technology, and how do you smoothly introduce it into existing environments?
- What role does corporate management play in supporting the data management process and how can you get them more involved?

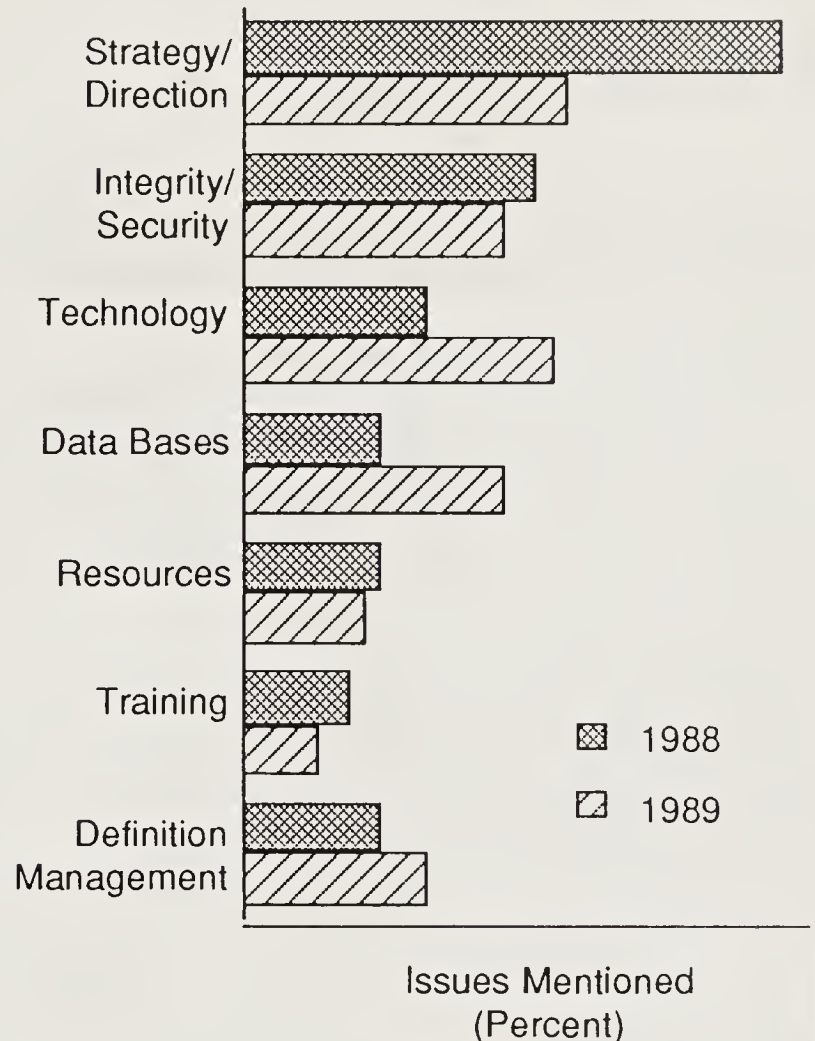
There are also chapters on the impact of other data base technologies, the current environment for data administration, and the future of data management.

INPUT's *Data Base Systems Development* is written for managers in the data management trenches with responsibilities for managing a complex and rapidly changing technological and organizational evolution. It's filled with exhaustive research, insightful analysis, and clear recommendations.

And we have a copy of the report waiting for you now.

All you have to do is fill out the enclosed order form and drop it in the mail today.

Data Management—Key Issues



THESE ARE THE ISSUES singled out by the data managers interviewed for INPUT's report. The rapid technological and management changes in this area are evident in several responses.

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INPUT's 1991 U.S. Information Services Vendor Analysis Program

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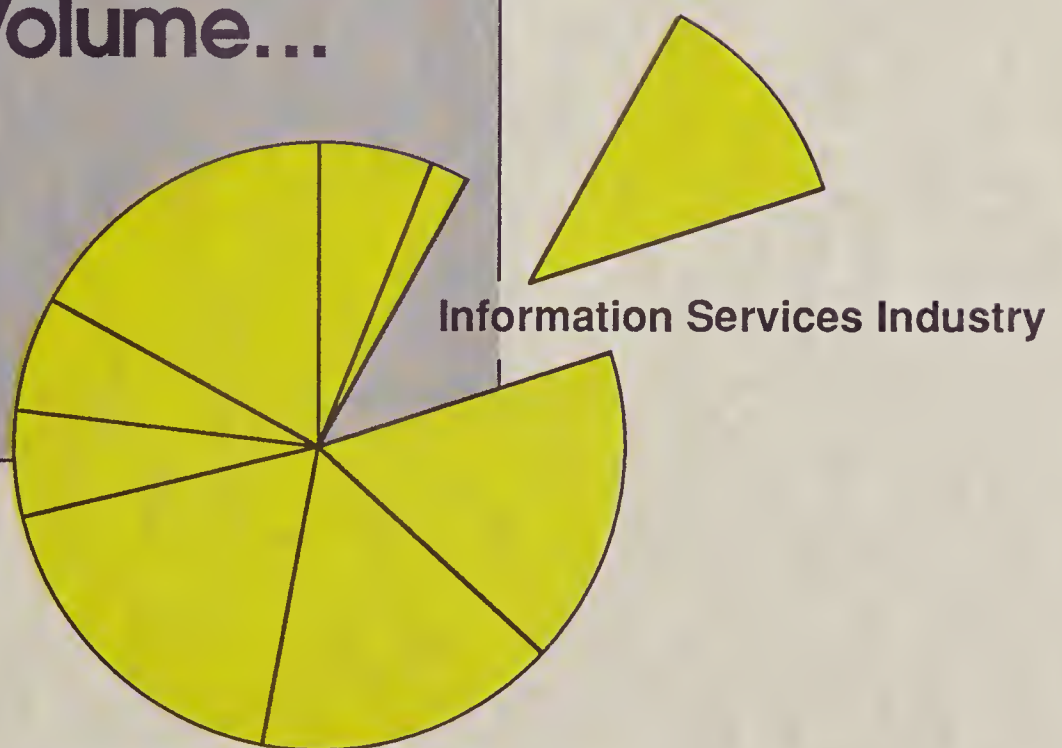
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Informed Analysis of the Information Services Industry

**Distilled into a
Single Volume...**



...The All-New 1990 Information Services

...It is the landmark report on information services, the touchstone against which all other analyses are measured. Its publication is eagerly awaited by marketers, strategic planners, chief executives, analysts, and members of the press who have to know what's going on in our business.

And it is soon to be released. The *1990 Information Services Industry Report* from INPUT is now available. Containing the most useful analysis of this ever-changing market that information professionals can buy, the 1990 report follows the path pioneered by earlier editions:

- Only the best market intelligence is used, data that is cross-correlated with independent sources and that is consistent with overall market figures when the various segments are totaled. Each individual element makes sense. And so does the larger picture composed of those elements. Only INPUT offers this consistency throughout its analyses from the smallest submarket to the entire industry.

- Only the most informative market divisions are used to make sense of recent market changes, giving you insights into the overall growth and transformation of the industry.
- Only the analyses of the best minds in the research community are used, men and women with decades of experience as users and vendors, buyers and sellers, people who know first-hand the forces that shape these markets.

These are the elements that make up the *1990 Information Industry Report* from INPUT.

And if you act before October 31, 1990, you'll pay \$150 less than the regular list price for large-scale analysis you can get nowhere else—a savings of 15%!

But what can the report offer you?

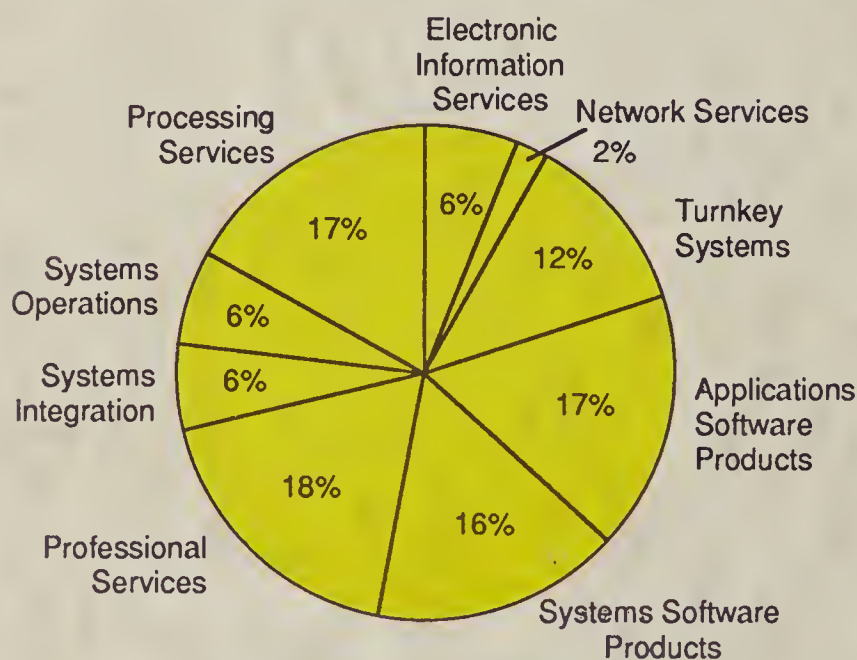
Unparalleled Information Concentration

The *1990 Information Services Industry Report* gives vendors and users an accurate summation of the large-scale trends in this industry today and for the next five years, including: market sizes and growth rates; detailed case studies of companies that have succeeded in all of the major delivery modes; major forces shaping market-segment growth; competitive analysis for each delivery mode, including revenue and net income analyses of companies successful in each mode; and more.

The report is designed from the ground up to be a single-volume resource you can use to answer the questions that will affect your success in the market as a whole:

- Where are the biggest growth opportunities in the industry and what are the forces driving them?
- How long-term are these forces and the opportunities they create? How are they likely to change?
- How are the growth rates for various market segments changing over time?
- How many companies are there in each segment? What are the implications for the competitive environment?
- How have revenue growth and net income growth compared over the last five years for the industry as a whole?

Information Services Industry Market by Delivery Mode, 1989



Total Size: \$92 Billion

Source: INPUT

THE DOLLARS AND MARKET SHARES attributable to the various submodes in the Information Services Industry Market. This is the kind of fine-grained analysis that INPUT offers industry professionals.

Industry Report!

- What impacts will the emergence of truly global information services companies have in the 1990s?

Only INPUT's 1990 *Information Services Industry Report* gives you answers to these large-scale questions that can be trusted in the context of our analyses of sectors, markets, and submarkets. All of the numbers agree. And all are updated every year, so that you get the best and most accurate picture available of what's happening out there.

INPUT's report also helps you answer questions at a much finer level of granularity. We analyze in detail the following delivery modes: Systems Software, Applications Software, Professional Services, Processing Services, Electronic Information Services, Turnkey Systems, Systems Integration, Systems Operations, and Network Services.

Then we address the questions about these delivery modes whose answers can affect the tactical and operational decisions you have to make every day:

- What are the potential impacts of new user strategies like outsourcing?
- How can you use the demand for outsourcing to forge long-term relationships with users in the areas of applications management, applications maintenance, and transition management?
- How will the actions of key vendors like IBM, EDS, and Andersen Consulting change the competitive environment in systems integration and systems operations?
- How fast is each delivery mode growing? What share of the total market is accounted for by each mode?
- How are increasing complexity, standards, workstation power, and the demand for custom solutions affecting the applications software mode?
- How can systems integrators respond to increasing systems complexity, strategic alliances, large-vendor competition, and the shift away from professional services?

And many more questions whose answers can have a significant impact on your bottom line.

This report contains the research against which all other industry analyses are measured. If you have used the report before, you know how good it is. If you haven't, why not use the enclosed order form to find out how easy it is to understand the market you're in?

REPORT CONTENTS

Information Services Industry

- Information Services Industry Structure
- U.S. Information Services Industry market Growth
- Stronger Information Services Markets
- Worldwide Information Services Market Potential
- Outsourcing
- Competitive Trends
- Public Information Services Vendor Performance
- Conclusions

Processing Services Market Analysis

- Processing Services Market, 1989
- Processing Services Market Trends and Issues
- Leading Processing Services Vendors
- Public Processing Services Company Performance

Network Services Market Analysis

- Network Services Market, 1989
- Network Services Market Trends and Issues
- Leading Network Services Vendors
- Public Company Network Services Performance

Professional Services Market Analysis

- Professional Services Market, 1989
- Professional Services Market Trends and Issues
- Leading Professional Services Vendors
- Public Professional Services Company Performance

Systems Integration Market Analysis

- Systems Integration Market, 1989
- Systems Integration Market Trends and Issues
- Leading Systems Integration Vendors

Systems Operations Market Analysis

- Systems Operations Market, 1989
- Systems Operations Market Trends and Issues
- Leading Systems Operations Vendors

Software Products Market Analysis

- Software Products Market, 1989
- Systems Software Products
- Applications Software Products

Turnkey Systems Market Analysis

- Turnkey Systems Market, 1989
- Turnkey Systems Market Trends and Issues
- Leading Turnkey Systems Vendors
- Public Turnkey Systems Company Performance

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If You Need To Know How To Turn New Developments in EDI To Your Advantage...

- ➡ **How is EDI being applied?**
- ➡ **What are users' concerns?**
- ➡ **How big is the market now and through 1995?**
- ➡ **Who are the leading EDI vendors?**
- ➡ **What sets their products and services apart?**

... INPUT Shows You Where the EDI Opportunities Are!

The potential is that Electronic Data Interchange (EDI) could revolutionize every aspect of the way companies do business with each other.

But what exactly is happening in the EDI markets today and for the next five years? How fast will they grow? What forces are at work accelerating that growth? Slowing it down? How will they affect *your* company?

If you are an EDI vendor or user, the answers to these kinds of questions could have a dramatic impact on how you structure your own plans for growth over the next five years.

INPUT has published a new report entitled *The EDI Market, 1990-1995*, that is designed from the ground up to answer these questions.

<i>The Electronic Data Interchange Market, 1990-1995</i>
Background on EDI
EDI Input-Output Analysis
<ul style="list-style-type: none">• Definition and Relevance• EDI Input-Output Matrix• Implications of Input-Output analysis
Market Size and Forecast
EDI Market Trends
<ul style="list-style-type: none">• Software Products• Network Services• Professional Service Trends
EDI Trading Communities and Applications
<ul style="list-style-type: none">• Automobile Manufacturing• Paper, Printing, and Publishing Industries• Retail, Apparel, and Textile Industries• Etc.
Conclusions and Recommendations

And if you act before November 19, 1990, and buy just this report, you'll pay \$300 less than the regular list price for the report—a savings of 10 percent on targeted market intelligence that could change the way you do business!

INPUT is also publishing a report that complements this report's total-market focus. Entitled *EDI: Business Integration Issues*, this second report focuses on the practical questions of how individual businesses have solved the problems of EDI integration in the real world.

And if you buy that report too, you can save an additional 10 percent off the total price for the two reports. A 20 percent savings for the complete picture!

EDI could transform companies' relationships with large vendors, with large customers, with banks, insurance companies, and firms at every level of the product development, manufacturing, and distribution chain. And that will create tremendous opportunities for people with the right information.

A Unique Analytical Tool

INPUT's report gives you that information. The result of more than a man-year of primary research into every aspect of electronic data interchange, *The EDI Market, 1990-1995* gives EDI marketers and users unique insights into where this rapidly changing technology is headed *and why*. The report tells you:

- How big the market for EDI network services, software, and professional services is now, and how fast it will grow over the next five years.
- Who the leading EDI vendors are, and why their products and services have been embraced by the marketplace.
- Where the new market and product opportunities will be.
- What the dominant user trends are in EDI adoption, including what users say their reasons for implementation are, what kind of platforms they are using, how they are reconciling parallel paper and electronic systems, and more.

The report also introduces a unique analytical tool called the EDI Input-Output Matrix. Using this matrix, vendors and users can focus on the issues that will have the greatest impact on their operations and overall profitability, clearly analyze the costs and benefits, and come to a rational conclusion regarding where EDI can give them a competitive advantage.

Creating Competitive Advantage

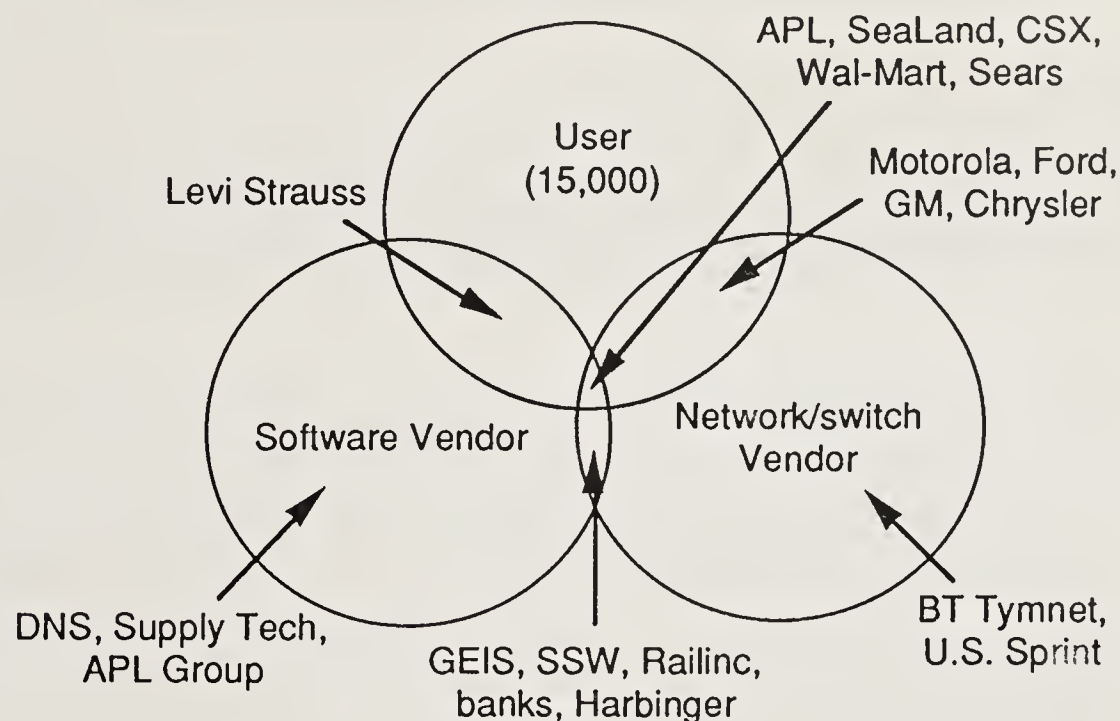
The report does not stop with these issues. *The EDI Market, 1990-1995* is a compendium of research that touches literally every significant aspect of this revolutionary technology:

- What impacts can be anticipated from EDI server architectures?
- What role will value-added networks play in the future?
- How will the "Hub-and-Spoke" phenomenon affect users' choices and vendors' product offerings?
- Where is the three-tiered market for message-switching software headed?
- How will market consolidation affect providers of network services?
- Where are the opportunities in education and training?
- What are the major industries adopting EDI?
- How are their demands pushing development of real-time EDI and other advanced services?

Plus detailed case studies of institutions that have adopted EDI, analysis of future market and technical directions, and a set of in-depth recommendations for the major EDI constituencies (users and vendors).

Companies that want to take advantage of developments in EDI need the best market intelligence available. They need detailed analysis based on new primary research into every major facet of this potentially revolutionary technology.

Players in the EDI Market Wear Many Hats



EDI SERVICES AND SOFTWARE are provided by third party vendors as well as large hub users as shown in this exhibit from *The EDI Market, 1990-1995*.

That is what INPUT's *The EDI Market, 1990-1995* gives you. It gives you the best data and analysis available.

It gives you a tool for building competitive advantage.

Use the enclosed order form to order your copy today and save 10 percent off the regular purchase price. Or buy the companion volume on *EDI: Business Integration Issues* too, and save 20 percent.

Do it now. Reliable information is the key to your success.

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INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

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SISIP

INPUT's 1991 U.S. Systems Integration Program

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California clients: Please add applicable sales tax on 25% of purchase price.

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Name _____

Title _____

Date _____

Date _____

If Knowledge (OF NETWORK INTEGRATION) Is Power...

- How big is the market?
- How fast is it growing?
- What forces are behind its growth?
- How important is network integration to users?
- What do vendors have to know to succeed?

...Then INPUT Has a Powerful New Report for You!

INPUT has just released a comprehensive new report that carefully analyzes the opportunities and pitfalls in network integration, one of the hottest segments of the computer market today.

Entitled *Network Integration, 1990-1995*, the report focuses on the practical needs of network vendors and system integrators, offering an oasis of hard data to marketers lost in a desert of speculation. It provides firsthand research on important market trends, a factual overview of the evolution of network technology, and a careful analysis of how users' needs for network integration have changed in recent years.

Getting this report at the full retail price could give you a significant competitive edge.

But if you act before July 9, 1990 you'll pay \$200 less than the regular list price for the report—a savings of 10 percent!

<i>Network Integration, 1990-1995</i>
Market Forecast
<ul style="list-style-type: none">• Network Integration• Network Component of Systems Integration• Major Markets
Integrating Corporate Networks
<ul style="list-style-type: none">• Networks Defined• Importance to Business• Trends toward Integration• Benefits of Integration
Network and Systems Integration
<ul style="list-style-type: none">• Network Integration Defined• Network Integration Plans• Network Integration and Systems Integration
Conclusions and Recommendations

Cashing In on Major Trends

Major trends in business and technology are pushing companies toward large-scale network integration projects. *Network Integration, 1990-1995* investigates both arenas, including:

- What are the major forces driving businesses toward a greater need for integration services, and how can you benefit?
- How has the flattening of organizational hierarchies made networking more important, and what opportunities has it opened for you?
- Where in the typical business is the need for instant information access growing fastest, and how can you help satisfy that need?
- How have network vendors responded to the demand for standardized integration tools, and how has that changed the integration rules?
- How will the growth of robust public networks, the emergence of virtual network capability, enhancement of PBX functionality, the rise of intelligent multiplexers, and the tremendous advances in relational data base management and distributed processing affect your business?

INPUT answers all of these questions, and more, offering you unique insights into complex phenomena based on actual surveys of the users and vendors defining this market.

Market Sizes, User Requirements

In addition to analyzing market trends, INPUT's *Network Integration, 1990-1995* focuses on other kinds of competitive information that could spell the difference between success and failure for marketers in this fast-changing competitive arena:

- Exactly how big is the market for network integration?
- How fast is it growing today? How fast will it grow over the next five years?
- How big will it be in 1995?
- How can you avoid confusion between network integration and systems integration, and set customers' expectations correctly?

What do users expect from network integrators?

- What do network managers expect?
- What kind of skills, and what level of competence, do users say they require from network integrators?
- Who are the leading vendors in this market?
- How have they successfully sold their services?

And more, including a full set of conclusions and recommendations, in which INPUT analyzes its own research findings and translates them into practical considerations for network and systems integration vendors.

Leveraging INPUT's Expertise

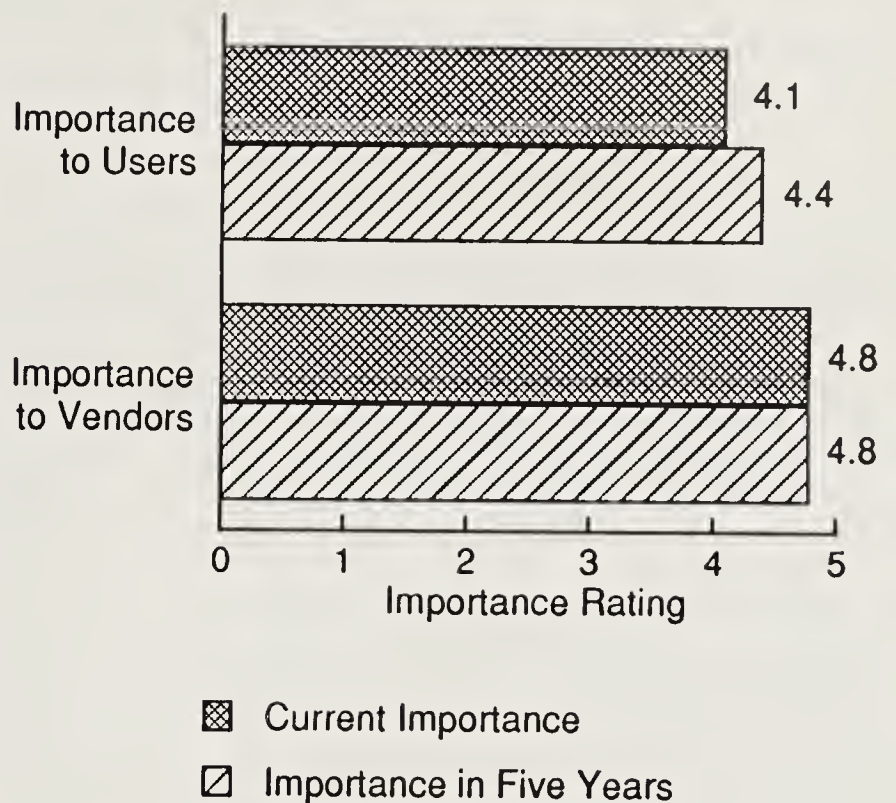
The days of the single-vendor, homogeneous computing environment are long gone. Computing power has been dispersed throughout organizations—first to the department level, then to the desktop level—with end users having a tremendous amount of influence over what kind of computer they will use. Mission-critical information now exists all over the typical company, on every conceivable kind of platform, accessible through every conceivable kind of communications architecture.

The opportunity for network integration is clear. But to make the most of that opportunity requires more than just aggressive development and marketing programs. It requires detailed, timely, and firsthand research so that you can know exactly where to deploy your scarce resources for maximum sales impact.

To do such a study yourself would require tens of thousands of dollars and hundreds of man-hours in staff time.

But to obtain the complete results of such a study requires only that you get in touch with INPUT. Enclosed is a coupon that outlines your options for getting this information as soon as possible.

Importance of Network Integration to Systems Integration Projects



The fact that users rate the importance of network integration in systems integration projects lower than vendors indicates a sales pitfall, and the need for client education on this subject. This is just one example of the kind of question INPUT answers in *Network Integration, 1990-1995*.

So take a moment now, fill out the coupon, and drop it in the mail today. We spent weeks talking to your prospects, and months analyzing their responses. And isn't that the kind of information you need to compete in today's network integration market?

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SYSTEMS INTEGRATION: APPLICATION OPPORTUNITIES

A Conference on the
Hot Applications in
Systems Integration

May 3 & 4,
1990
Sheraton
International
Conference
Center
Reston, Virginia

INPUT

1953 Gallows Road, Suite 560 • Vienna, VA 22182
California • New York • Washington D.C. • London • Paris • Tokyo

Systems Integration: Application Opportunities

Key Benefits of Attending this Conference

- You will learn about the demand and opportunity for three of the most widely discussed application and technology areas:
 - Image Processing
 - Network Integration
 - Computer-Integrated Manufacturing
- You will learn about the status and recent developments in CASE
- Bring yourself up to date on current market issues

Who Should Attend?

- Systems Integration vendor marketing and operating executives
- Systems Integration planning management
- Information Services firms considering SI participation
- Executives of companies who are contemplating using Systems Integration Services
- Computer equipment providers
- Professional services firms
- Systems Operations companies

CONFERENCE OVERVIEW

INPUT, a leading provider of information systems and services research and consulting, is pleased to present a conference that focuses on the new and expanding issues of the systems integration (SI) market. Seldom has an information service caught on as rapidly as SI.

Users have embraced it as an alternative for implementing information-based solutions. Vendors are using it as the ultimate channel for delivering their products and services to large and intermediate customers. The SI market offers revenue and profit opportunities for large and small vendors as prime or subcontractors.

Expand your perspectives regarding systems integration by attending this INPUT conference that will include presentations and a panel discussion on the market and three key application areas. Systems integration users and buyers will discuss their actual experiences implementing systems. INPUT consultants will present industrywide research on opportunities for these applications and technologies. If you're involved in SI today, or contemplating entry, you need to be aware of new market developments. This is a valuable opportunity to inform yourself.

OUR SYSTEMS INTEGRATION CREDENTIALS

In 1984, INPUT foresaw the growing need for SI planning data, and we included it in our Market Analysis Program (MAP). Since then, SI has become the fastest growing opportunity in the information services market. In 1987, INPUT established a separate Systems Integration Program (SIP) to handle the special needs of clients that were focused on the SI market. This research and consulting service is extremely comprehensive—we believe the best in the business—and it is coordinated with INPUT's other information services research and consulting programs. Our service is subscribed to by most of the leading SI vendors in the U.S. We have a similar service in Europe and have developed sizings of this market in the remaining areas of the world, as well...

In conjunction with the Systems Integration Program, INPUT provides the annual conference which is described herein. Our clients can attend the conference as part of their service contract. Companies that do not yet subscribe are invited to attend the conference for the fees listed on the back of this brochure. A limited number of seats are available for non-subscribers, so please register early.

INPUT[®]

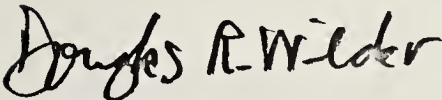
1953 Gallows Road, Suite 560, Vienna, VA 22182
703-847-6870 Fax 703-847-6872

Dear Executive:

Systems integration has become one of the most successful delivery channels for information products or services. If you are already participating in this market or considering entering it, you should attend INPUT's Systems Integration Conference described in the enclosed brochure.

The conference will provide you with important information on SI market trends and user and vendor issues. Please join us on May 3 and 4 in Reston, Virginia.

Yours sincerely,

A handwritten signature in black ink that reads "Douglas R. Wilder". The signature is written in a cursive, flowing style.

Douglas R. Wilder
Director, Systems Integration Program

INPUT

Systems Integration Conference

May 3 & 4, 1990

Sheraton Hotel, Reston, VA

Register today
by calling
703-847-6870

Fee Schedule

The regular conference fee is \$695; \$495 for additional attendees from the same company. Per their contract, subscribers to INPUT's Systems Integration Program may send two representatives at no charge. Additional client personnel may attend the conference at a charge of \$295.

EARLY BIRD DISCOUNT—Registrations received before April 1, 1990 take off 10%

Registration Form

Yes! Please sign me up for the Systems Integration Conference, May 3 & 4, 1990 at the Sheraton Hotel, Reston, VA.

- ☐ Check enclosed in the amount of \$_____
- ☐ Bill me in the amount of \$_____ on Purchase Order #_____.
Payment must be received before conference.
- ☐ Charge \$_____ to my American Express #_____.
Exp. date _____ Signature _____
- ☐ Systems Integration client attending at no charge.

Name: _____

Title: _____

Company: _____

Address: _____

City: _____ State _____ Zip _____

Telephone: (_____) _____ Signature: _____

(Please duplicate this form for additional attendees and return the forms together)

Conference space is limited! To ensure your reservations, either mail this form to
INPUT, 1953 Gallows Road, Suite 560, Vienna VA 22182,
or call Barbara Fisher, Conference Coordinator, at (703) 847-6870.
You can also FAX your registration to us at (703) 847-6872

Cancellations must be in writing. Cancellations received after April 3 will be assessed a \$50 cancellation fee.

CONFERENCE AGENDA

THURSDAY, MAY 3

- 8:00 *Registration and Continental Breakfast*
- 8:45 *Welcome and Introduction*
- 9:00 **Systems Integration Market**—An update of INPUT research on the systems integration and systems operations markets
- 10:00 **Network Integration**—A presentation of INPUT's study of the network integration submarket, including user and vendor views of its relationship to systems integration opportunities.
- 11:00 *Break—Refreshments*
- 11:15 **Image Processing**—A discussion of INPUT's analysis of image processing technology and applications prospects, based on both user and vendor views of this submarket.
- 12:15 *Lunch*
- 1:30 **Buyers' Experience**—Two systems integration executives will discuss their firms' actual experiences in planning for and implementing systems integration projects. These discussions will focus on managing the vendor interface and the benefits that systems integration provides. Projects that include image and network integration will be addressed.
- 3:45 *Break—Refreshments*
- 4:00 **CASE Products**—A presentation and discussion of INPUT's research on CASE products and their impact on the systems development and implementation process and on systems integration.

FRIDAY, MAY 4

- 8:00 *Continental Breakfast*
- 8:30 **Computer-Integrated Manufacturing** —A status report and intermediate results of INPUT research of vendor and user views of the CIM market- place including driving forces and a forecast of end-user expenditures.
- 9:00 **Buyer's Experiences**—A systems integration buyer will discuss actual experiences implementing a CIM system through systems integration. The discussion will include managing the vendor interface and the benefits that systems integration provides.
- 10:00 *Break—Refreshments*
- 10:15 **Outsourcing—A Variety of Options**—A panel discussion by vendor executives of the pros and cons of outsourcing alternatives. The discussion will include business consulting, systems integration and systems operations, and relationships between these information services delivery modes.
- 12:00 **Report on INPUT's 1990 Systems Integration Program** progress and plans.
- 12:30 *Lunch*
- 1:30 **INPUT Consultants** will be available to discuss with you topics of your interest in the systems integration market.

REGISTER TODAY!
CALL INPUT
(703) 847-8670
FAX (703) 847-6872

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Conference registrations
received before April 1, 1990
TAKE OFF 10%

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SYSTEMS INTEGRATION: APPLICATION OPPORTUNITIES

May 3 & 4, 1990, Sheraton International Conference Center, Reston, Virginia

CONFERENCE REGISTRATION FEES

Clients—Of course, INPUT Systems Integration clients may send two representatives as part of their service contract. Additional client personnel may attend the conference at a charge of \$295.

Non-clients—The first representative of a non-client company may attend the conference for \$695. Additional attendees from the same non-client company may attend for \$495.

PAYMENT AND CANCELLATION POLICY

You may cancel your reservation without a \$50 cancellation fee until April 3, 1990. Cancellations must be in writing. INPUT will consider purchase order numbers or company checks as proper reservations. INPUT reserves the right to make changes to this conference without notice.

ACCOMMODATION

Only minutes from Washington Dulles International Airport and only twenty minutes from downtown Washington D.C., the Sheraton's International Conference Center provides complete conference and guest accommodations. The hotel offers the finest amenities and accommodations and a very special price for INPUT SI Conference attendees: only \$90 single or \$100 double.

Please make your reservations directly with the conference center by calling (703) 620-9000; ask for the INPUT group rate. Room space can only be guaranteed until April 16, 1990, so book early!

REGISTER TODAY!

CALL 703-847-8670 or mail or fax the registration form today!

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If You Need Specific Intelligence on Opportunities in the Federal Computer Equipment Maintenance Market . . .

- What are specific agencies' procurement plans through 1995?
- How do buyers evaluate maintenance vendors?
- How big is the market, and how fast is it growing?
- What are successful competitors doing?

... You Need the Latest Report from INPUT!

INPUT has released a new report entitled *Federal Equipment Maintenance Market, 1990-1995* that identifies and analyzes hundreds of millions of dollars worth of federal computer equipment maintenance contracts through GFY 1995.

And if you act before January 25, 1991, you'll pay \$175 less than the regular list price for the report—a savings of 10 percent!

Federal Equipment Maintenance Market, 1990-1995

Market Analysis and Forecast

- Current Market Conditions
- Market Structure
- Market Forecast
- Federal Market Issues
- Competitive Environment
- Leading Agencies

Federal User Requirements and Trends

- Agency Hardware Environment
- Performance Requirements
- Agency Acquisition Plans and Preferences
- Agency Satisfaction with Vendor Performance
- Trends

Competitive Trends

- Vendor Participation
- Vendor Perceptions
- Discounting and Alliance Practices
- Maintenance Contractor Selection Criteria
- Trends

Key Opportunities

- Present and Future Programs
- Equipment Maintenance Opportunities by Agency

If pinpointing procurements was all it did, this report would be well worth such a moderate price. After all, you have to have this intelligence if you are going to know where to deploy your sales, marketing, and engineering resources to make the most of these multimillion-dollar opportunities.

But INPUT does more than just flag pending procurements.

Answers

The report puts this specific information in the context of both the larger forces shaping the market, and the tactical considerations you cannot afford to ignore. Its purpose is to give you answers to all of the major questions you have to address, including:

- To buyers selecting maintenance providers, what is the relative importance of performance and contract cost?
- How do buyers weight other factors in their decisions, such as reputation, cost control procedures, proposed technical solution, and contract type?
- How big is the equipment maintenance market, and which segments are growing fastest?
- How can you shape your business to turn budget constraints, computer obsolescence, the new emphasis on competition, multivendor installations, and widespread microcomputer penetration to your advantage?
- Who are the leading vendors in federal equipment maintenance, and what strategies are they pursuing?

And other information that lets you shape effective strategies for exploiting all kinds of equipment maintenance opportunities for the next five years.

A Competitive Edge

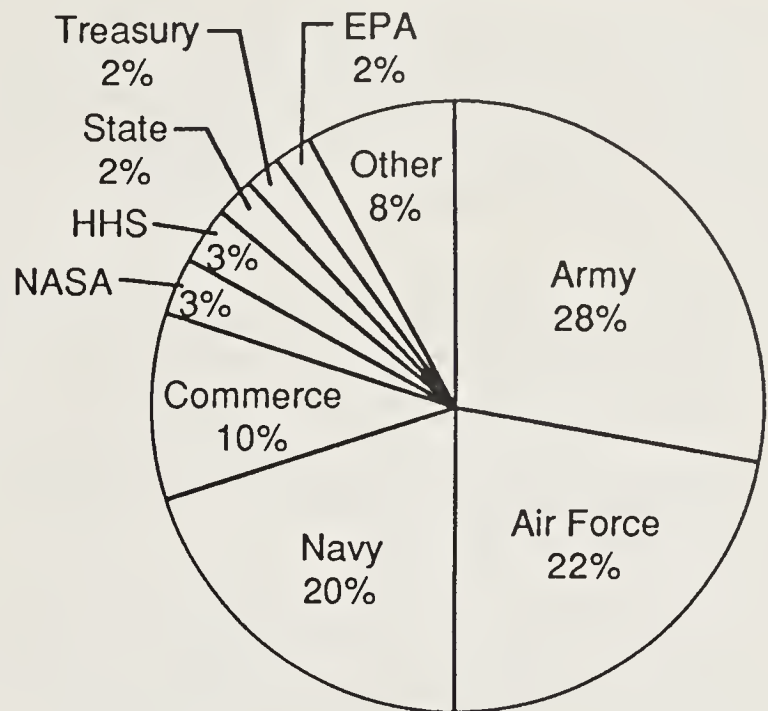
In addition to this large-scale analysis, INPUT's report concentrates on providing specifics on pending procurements together with information on agency practices and competitive trends. And that gives you an edge on companies without access to this kind of in-depth, informed analysis. The report answers questions about:

- Which agencies have obligated the largest expenditures to equipment maintenance over the last two years?
- What is the total number and dollar value of large and midsize systems installed at federal agencies?
- What is the average age of the installed base, by agency?
- What percentage of federal users employ third-party maintenance organizations? OEMs? In-house maintenance services?
- What are the present satisfaction levels of agencies with their maintenance services? What areas do they say need improvement?

And 86 specific agency procurement opportunities, including PAR reference, RFP schedule, and funding for GFY 1990-1995, where known.

INPUT is able to provide some of this information to you through a careful analysis of the OMB/GSA Five-Year Plan submitted in compliance with OMB Circular A-11, budget requests, and other documents. But we have also tapped sources for information not available to the general public, including the Five-Year Defense Plan and supporting documentation.

Leading Agencies (FY 1987, 1988)



INPUT IDENTIFIES THE LEADING AGENCIES for purchase of equipment maintenance products and services. This is only one kind of market research available in the report, which includes market analysis and forecast, competitive trends, key opportunities, and user requirement data.

The result is a distillation of millions of words of federal procurement verbiage into a single, clear, and concise volume that pinpoints opportunities and offers a means of exploiting them. This is a powerful competitive weapon in a market where having the right information at the right time can make all the difference.

So use the enclosed order form to get your copy of *Federal Equipment Maintenance Market, 1990-1995* today.

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Tokyo

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Kanda Sakuma-cho, Chiyoda-ku
Tokyo 101, Japan
Tel. (03) 3864-0531 Fax (03) 3864-4114

How Can You Find— and Make the Most of— International Network Service and Support Opportunities...?

- ◆ How big is the market?
- ◆ Where is it growing fastest?
- ◆ What do users say they require?
- ◆ Who are your competitors?
- ◆ What is driving growth?

...INPUT Makes It Easy with a New Network Service Market Report!

As networking becomes a strategic necessity for modern business, the revenue opportunities in network service and support will grow dramatically. But how can a service organization best take advantage of those opportunities? A new report from INPUT, entitled *Network Service Opportunities*, analyzes these opportunities in detail, showing you how to shape your service offerings and competitive strategies to make the most of the most exciting new growth markets in customer service.

The report represents more than a man-year's worth of targeted research into the American and European markets, and is a superb value at full price. But INPUT is offering you the opportunity to have all of the benefits of this research at a considerable savings.

If you act before December 31, 1990, you'll pay \$250 less than the regular list price for the report—a savings of over 10 percent!

The opportunities for network support are there; but they're not always easy to find. INPUT's research has been carefully designed to track down and highlight those opportunities, giving you the information you need to focus your resources where they can earn you the highest possible return.

Strategic Analysis

The market for networking is diverse and confusing, and the market for network services reflects these characteristics. INPUT's *Network Service Opportunities* helps you unravel the market to see where your company can make money in a whole new growth area, answering strategic questions like:

- How big is the network services market in the United States and Western Europe today, and how fast will it grow over the next five years?
- Which market segments and services will grow most rapidly? Least rapidly?
- What are the four key factors driving the markets for network service and support?
- Which four factors are inhibiting growth in these markets?
- What do users really require from network service providers, and how do those requirements change as users grow?

Tactical Insight

In addition to these large-scale concerns, the report offers insight into the day-to-day tactical questions that you have to answer to keep your company growing:

- How do users rate the relative importance of hardware maintenance, systems software support, applications support, network monitoring, network/systems operations, communications evaluation, application evaluation, network customization, and network planning in the United States and Europe?

Network Service Opportunities

Market Forecast

- Network Service Components
- Market Forecast
- Factors Affecting Growth

Key User Needs

- User Networking
- User Network Service Requirements
- Future User Requirements
- User Attitude toward Systems Operations
- Source of User Services
- User Requirements for Vendor Services
- User Interview Comments

Vendor Requirements

- Need for Focus
- Network Development
- Key Vendor Requirements
- Factors Influencing Network Service Development
- Opportunities
- Competitive Environment
- New Skill Requirements

Recommendations for Customer Service

- How can you fight the minitrend toward self-service among experienced users in large companies?
- How will the user demand for open networking standards affect your service offerings? How will you differentiate your company?
- What new skills should service organizations cultivate to be able to exploit the new requirements for network support?
- How can you design and deliver services to support the large number of inexperienced network users?
- How can you accommodate the increasing demand for design, consulting, and management skills in your service offerings?
- How can you structure service offerings that will satisfy the needs of all customers, large and small, experienced and inexperienced?
- How do successful network services vendors rate the relative importance of multivendor environments, larger skill sets, software compatibility, and other market issues?

The report also goes beyond evaluating these tactical issues to offer you specific, research-based analysis and recommendations for future action in this changing business.

We Know the Market

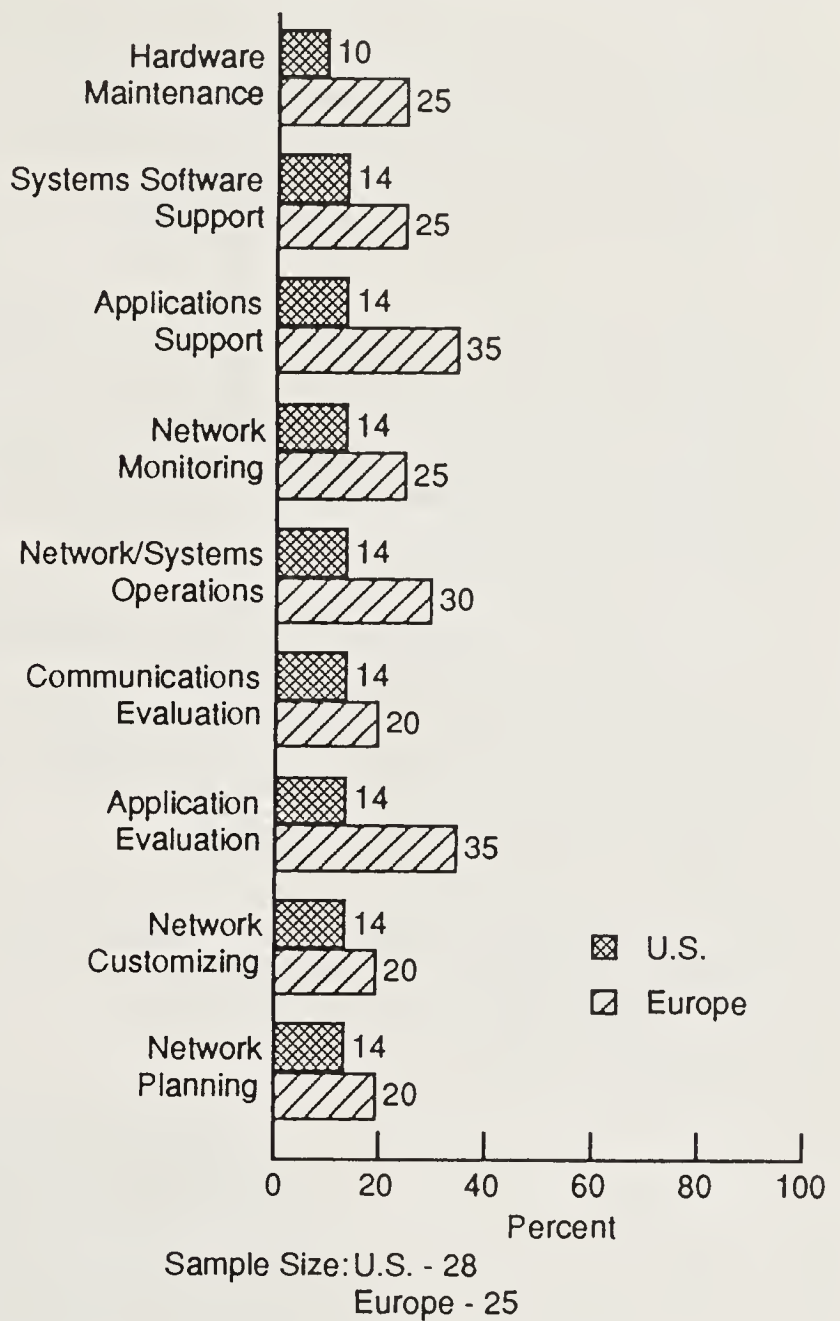
INPUT's customer service analysts have decades of experience on both the user and vendor sides of the network service question. They have watched the market evolve from the beginning, always noting growth areas, key trends, and the major characteristics of successful vendor strategies.

And now they have distilled their experience and targeted market intelligence into a single-volume report designed from the ground up to guide you to the most promising opportunities in a very important market.

To make the most of those opportunities, you have to have excellent information and incisive analysis.

INPUT's *Network Service Opportunities* offers you both. Use the enclosed order form to order your copy today.

In-House-Provided Services



THE THREAT of do-it-yourself network service is quantified in this exhibit from INPUT's report on *Network Service Opportunities*.

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For Marketers with a Thousand Questions about Service Programs Offered by the Seven Giants of Large-Systems Service . . .

- ▲ What are the strengths of the major vendors?
- ▲ How are service contracts structured?
- ▲ How many service employees do they have, including FEs?
- ▲ What are their discount structures?
- ▲ How do they support other vendors' equipment?

Only INPUT Has the Answers!

Comprehensive, objective information on what your competitors are doing in large-systems service—that's what you get from INPUT's latest analysis of the service vendors that dominate your market.

**And if you act before March 30, 1990
you'll pay \$250 less than
the regular list price
for the report—a savings of 10%!**

Entitled *Service Vendor Analysis—Large Systems*, this newest INPUT report profiles the seven giants of large-systems service:

- Amdahl
- Bull
- CDC
- Hitachi
- IBM
- NCR
- Unisys

Service Vendor Analysis— Large Systems

Service Vendor Profiles

- Amdahl Corporation
- Bull HN Information Systems Inc.
- Control Data Corporation
- Hitachi Data Systems Corporation
- IBM Corporation
- NCR Corporation
- Unisys Corporation

Large-Systems Service Vendor Comparative Tables

The report provides complete profiles of these companies, including the history of their efforts in large-systems service, their service demographics, and an investigation of their various service delivery modes.

But the report goes on to offer a comprehensive strategic commentary on each, outlining the pressures on the various vendors, how they are responding, and how these responses create opportunities for established providers or new entrants in this fast-growing market.

With the changes in large-systems service, companies have had to reappraise their objectives. Even the seven largest players have begun to reevaluate their direction and strategy.

INPUT's report analyzes the seven giants' service business and plans for change:

- What are the total revenues and service revenues of each company, and the percent change over the last year?
- How are they performing on a revenue-per-employee basis?
- How are each vendor's service contracts structured?
- What kind of billable exclusions does each vendor have?
- What are the hourly rates of each vendor, by time of day, by time of week, and by time of year?
- What kind of multiyear and prepayment discounts does each vendor offer?
- What other kinds of discounts apply, including carry-in, call screens, dollar and unit volume, and so on?
- How many service employees does each company have, including FEs and CEs?

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Dear Colleague:

How much value could you get out of detailed and comprehensive analysis of the seven dominant players in the large-systems service market?

How much would it mean to you to be able to know what their contract coverage is, what their revenue per employee is, how they bill their time, and all of the other nitty-gritty details that make large-systems service such a complex and lucrative enterprise?

INPUT has just released the most comprehensive and up-to-date report available on this market, *Service Vendor Analysis—Large Systems*. In it, we analyze the service organizations, delivery modes, and strategic focus of the service organizations of Amdahl, Bull, CDC, Hitachi, IBM, NCR, and Unisys.

The report is based on in-depth studies of individual vendors. The results apply to every company that wants to play in this market.

Why be satisfied with hearsay when you can get fundamental market data based on hard facts and careful analysis?

INPUT's new report offers you all of that. Order it today.

Regards,



Thomas O'Flaherty
Vice President

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YES! I need answers to all of my questions about what the major players are offering in large-systems service! I need INPUT's report, *Service Vendor Analysis—Large Systems*, today!

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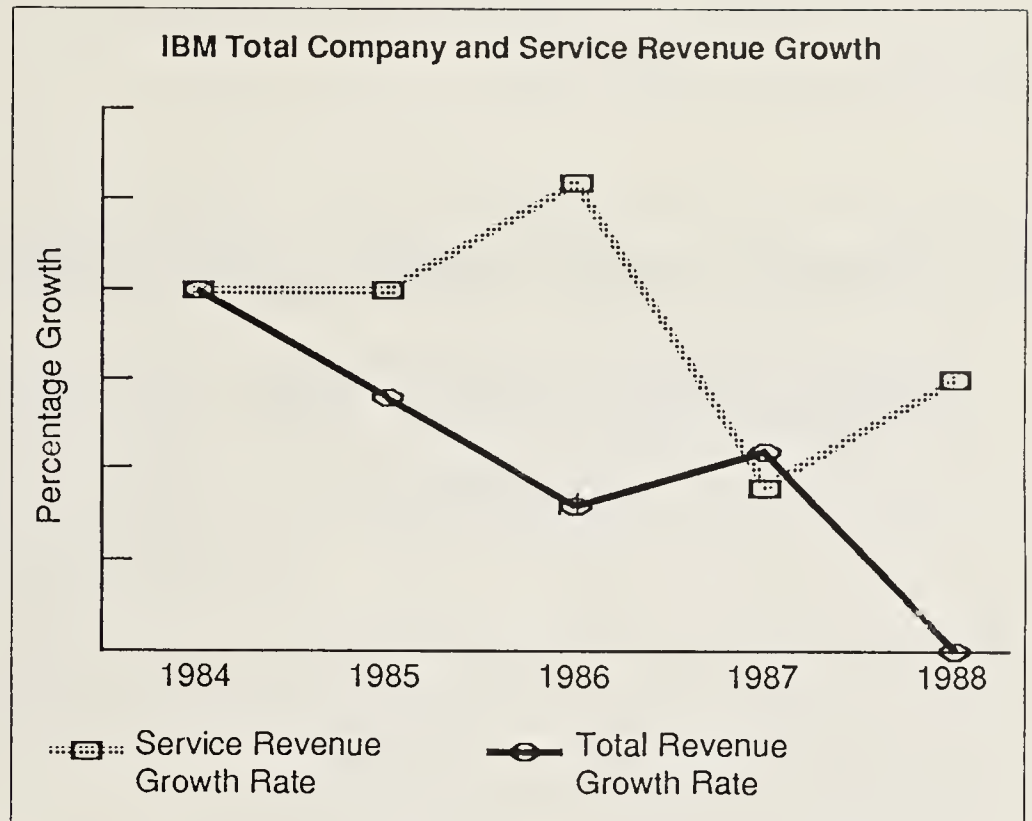
Company Trends and How They Affect You

INPUT analyzes changing market issues, the pressures being brought to bear on the dominant players, and the effects on companies offering service in this environment:

- Where will the strategic focus of each company be during the next few years?
- What does IBM's relatively small proportion of service revenues mean for competitors?
- What are the overall trends for service revenue growth versus total revenue growth?
- What effect will IBM's bold strokes in service mean for other companies' offerings?
- What impacts do the services offered by VARs and OEMs have on the total large-systems service picture?
- How are the service organizations of each company structured?
- How are CAD tools, RF and hardwired data communications, network consulting, and other innovations changing the overall service picture?

And more...

This information can spell the difference between success and failure in determining pricing, developing service offerings, structuring contract coverage, even in knowing when and how far to extend or reduce present service operations.



THE GROWTH RATES of IBM's total revenue versus service revenues are graphed in the above report exhibit. This relationship is crucial. It tells you how much room a company has to manipulate service pricing, and suggests how likely such manipulation might be.

INPUT's *Service Vendor Analysis—Large Systems* puts the resources of one of the most respected authorities on service at your fingertips. The report provides information to assist in planning your company strategy.

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If an Objective Analysis of Users' TPM Requirements Would Make Your Job Easier...

- ▲ What level of system availability do users require?
- ▲ What selection criteria do they use?
- ▲ How do they rate TPM compared to manufacturers' service offerings?
- ▲ What is the relative importance of support, response time, and parts availability to users?
- ▲ How important is hardware support? Response time?

...Then INPUT Just Made Your Job Easier

We've just produced a new INPUT report that gives you the best and most comprehensive market intelligence on third-party maintenance available.

Information on how buyers rate third-party maintenance offerings, on what they demand from third-party suppliers, and on what criteria they use to decide who will provide this lucrative service—INPUT's *Analysis of Third-Party Maintenance* gives you all of these powerful competitive tools, and more.

Analysis of Third-Party Maintenance

User Service Requirements—All TPM Users

- TPM Selection Criteria
- TPM Contractual Coverage
- TPM Services Performance Analysis

User Service Requirements—Large Systems

- TPM Selection Criteria
- TPM Contractual Coverage
- TPM Services Performance Analysis

User Service Requirements— Midrange Systems

- TPM Selection Criteria
- TPM Contractual Coverage
- TPM Services Performance Analysis

User Service Requirements— PC/Workstation Systems

- TPM Selection Criteria
- TPM Contractual Coverage
- TPM Services Performance Analysis

**And if you act before April 30, 1990,
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INPUT interviewed 178 of the top information systems executives of companies that rely on TPM for service of large systems, midrange systems, and workstations/PCs. Every aspect of the service markets was explored: how the markets are changing; what companies look for in service providers; how they weigh manufacturers versus third parties; how factors like price, quality, system availability, remote service, and others influence the purchase decision; and more.

Reliable Competitive Data for Systems and Software

The resulting data has been compiled into a timely, manageable, and coherent distillation of the major competitive factors in TPM today.

Analysis of Third-Party Maintenance is not just a report. It is intelligence organized to give you a weapon for enhancing your products' strengths.

The volume includes the following kinds of competitive information for hardware maintenance and support:

- The relative importance of price and quality in service and support agreements
- Users' demands for system availability, ongoing maintenance, and parts availability, and how TPM companies compare with manufacturers
- The growing requirements for three-shift, 24-hour-a-day contract coverage
- How users decide between TPM vendors and manufacturers for hardware support
- The ever-increasing demands for system up-time, and how TPM companies and manufacturers measure up
- How TPM companies have lost a significant advantage now that several large manufacturers service equipment from other vendors

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YES! I need objective information on users' requirements for third-party maintenance! I need INPUT's report, *Analysis of Third-Party Maintenance*, today!

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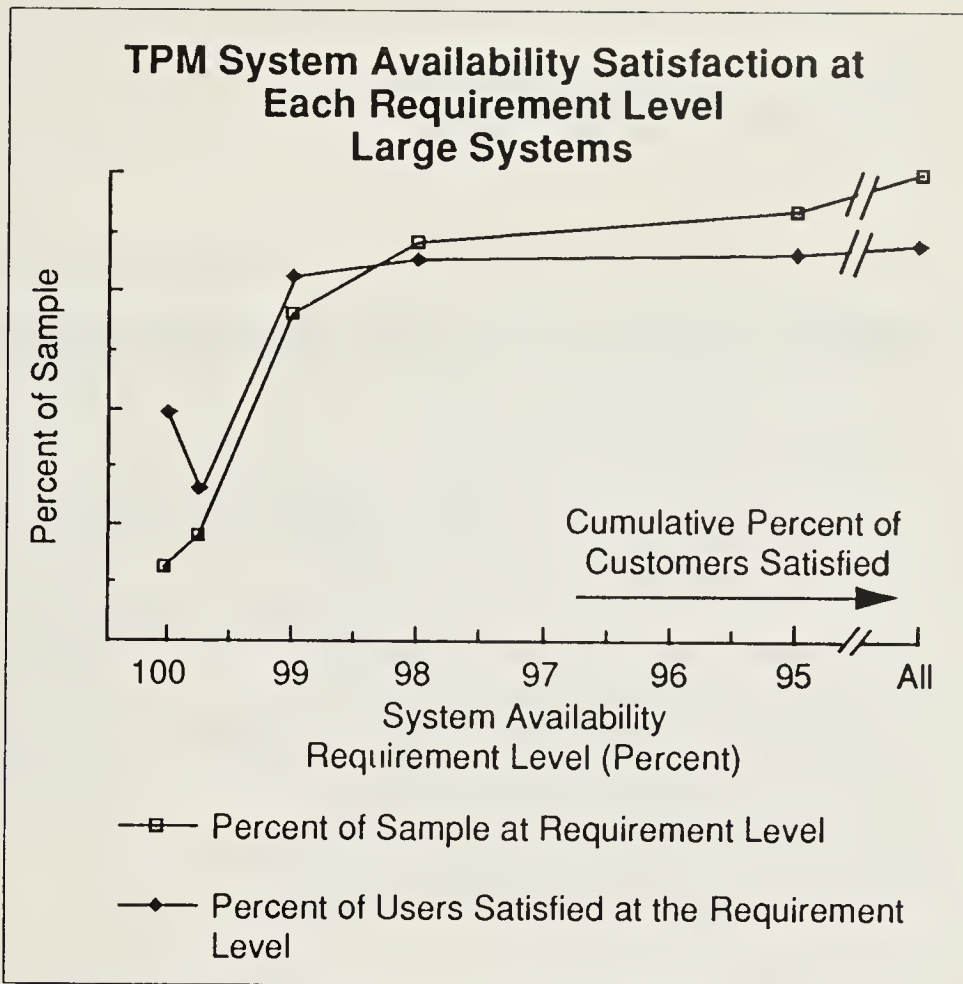
Analysis of Third-Party Maintenance also investigates the increasingly important area of software support, with detailed analysis of:

- What kind of software support do users typically receive, versus what they require?
- How do users rate the importance of ancillary services like training, planning, network design, and network management, and how do they rate the service they get from TPM vendors?
- How willing are customers to use TPM for growth products like applications support, operating system support, and operator education and training?
- How do users respond to existing discount programs, and what impact do these programs have on their willingness to change vendors?

And more on the market and competitive forces that are changing the way you'll do business in the 1990s.

- How will you have to improve service?
- How will you achieve the levels of system availability demanded today?
- How will you respond to the entry of large manufacturers into multivendor maintenance?
- How will you get the competitive information you need to keep growing in a changing market?

INPUT's *Analysis of Third-Party Maintenance* provides guidance and information on all of these questions, and more. Use the enclosed order form to order your copy today!



The relative lack of satisfaction among the most demanding customers shows how demands for system availability have skyrocketed. INPUT's report gives you hard data to evaluate the importance of this trend for your business.

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If You Need an Edge in the Federal Financial Systems Market...

- ◆ Where are the major active procurements right now?
- ◆ Where are the financial systems growth areas?
- ◆ Will Reform 88 ever affect you?
- ◆ What are the impacts of the JFMIP?
- ◆ Who are the dominant competitors, and what are they doing?

...INPUT Can Show You Exactly Where the Opportunities Are!

The federal financial systems market is one of the government markets with the highest potential for explosive growth.

And INPUT has just published a new report titled *Federal Financial Systems Market, 1990-1995*, designed to give you the competitive advantage that comes with targeted intelligence on agency requirements, legislative impacts, and where the major procurement opportunities are.

At full price, it is an exceptionally cost-effective way to concentrate your resources on only the best available opportunities.

And if you act before November 5, you'll pay \$95 less than the regular list price for the report—a savings of 10 percent!

The report contains two kinds of information that you cannot find anywhere else in such a

concentrated form. The first is in-depth analysis of this market, including all the factors now working to enhance its growth.

And the second is specific, tactical information on what the procurement plans of the major agencies are, how big they are, when the RFPs are due, and what the selection criteria are likely to be.

The kinds of tactical questions covered in the report include:

- Which seven federal agencies represent the hottest current opportunities for financial software vendors, either at the RFI or RFP level?
- What criteria are used to evaluate financial system vendors, and how do they differ from agency to agency?
- How important are custom programming services to agencies needing financial systems?
- What strategies have Computer Data Systems Incorporated and KPMG Peat Marwick used to sell in the federal market? Why have they been successful where others have failed?
- Which firms not currently on the GSA schedule may become significant competitors in the future, and why?
- How can strategic alliances help you penetrate the financial systems market?

And other questions concerning the types and sizes of opportunities for financial systems procurements by agency.

The Highest Possible Returns

As you know, the laws of supply and demand sometimes do not have the most influence on which agencies buy which financial systems in the federal market.

Other forces, including attempts at standardization, agency requirements, legislative initiatives of one kind or another, attempts at reform, and the constriction of federal budgets sometimes predominate.

<i>Federal Financial Systems Market, 1990-1995</i>
Market Analysis and Forecast
<ul style="list-style-type: none">• JFMIP Background• Financial System Standardization Measures• Agency Awareness of Regulations• Impediments to Vendors• Budget Constraints and Software Procurement alternatives• Procurement Opportunities• Market Forecast• Conclusions and Recommendations
Competitive Considerations
<ul style="list-style-type: none">• Current Software Vendors• Future Software Vendors• Impact on Hardware Vendors
Key Opportunities
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Federal Financial Systems Market, 1990-1995 analyzes these forces in detail, bringing to bear INPUT's tremendous research resources and our staff's decades of experience in the federal maze on such questions as:

- How big is the market for federal financial systems, and how fast is it growing?
- Which delivery modes (professional services, software, and computer equipment) represent the best growth opportunities?
- Which procurement mode do most agencies use for obtaining core-compliant software?
- How can you use the Joint Financial Management Improvement Program (JFMIP) to help you penetrate this market?
- How big is the market for federal financial systems? How fast is it growing? Which category (professional services, software, equipment) is growing fastest?
- How have GAO audit targets affected the market for financial systems?
- How will the Financial Integrity Act of 1982, Reform 88, OMB Circular A-127, and GAO Title 2 affect your selling in these markets?
- How are some agencies getting around the requirements for core-compliant financial software?

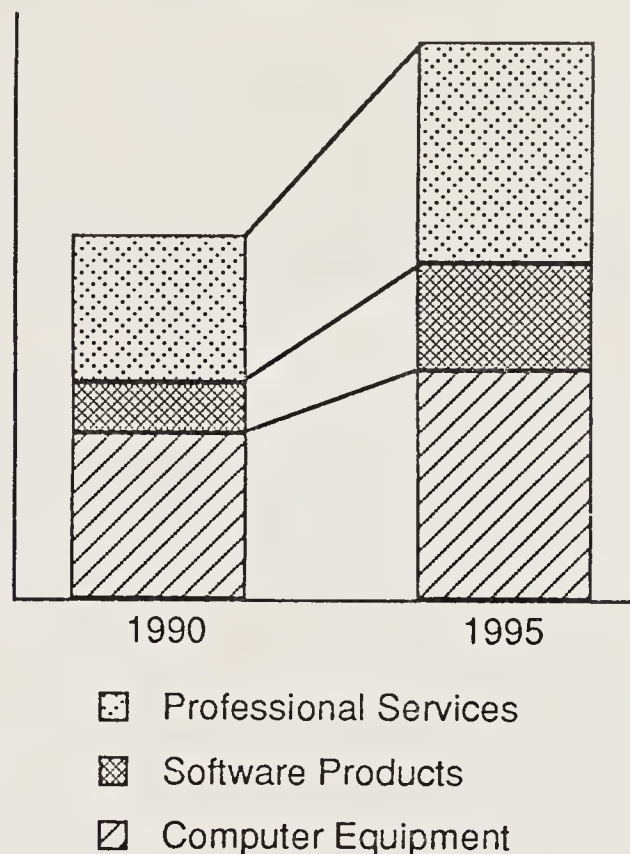
INPUT goes into all of these subjects—and many others—in depth, so that you can understand how the larger market forces are affecting financial systems procurements, and can concentrate your sales and marketing resources where they will yield the highest possible returns.

Concentrated Intelligence

The information in this study represents months of research, including interviews with key agency procurement officers and an exhaustive search and analysis of vast numbers of federal documents related to financial systems procurement. And all of it—surveys, interviews, search, and analysis—have been tempered by our unmatched experience in uncovering opportunities in one of the most complex markets in the world.

The result is five chapters of concentrated intelligence that can help you target the best procurements—intelligence that would be impossible for you to replicate on your own.

Federal Financial Systems Market Forecast



SIZE AND GROWTH RATE DATA for three key segments of the Federal financial systems market are shown in this graph, which is typical of the kind of information contained in the INPUT report.

But you don't have to. Because to get the same results—to get all of the benefits of one of the most sophisticated research efforts ever conducted in the federal market—all you have to do is ask.

So use the enclosed order form to ask for your copy of *Federal Financial Systems, 1990-1995* today.

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The Most Comprehensive Overview of the Federal Computer Security Market Available Today . . .

- ✓ Complete Market Analysis and Forecast
- ✓ Trends in Federal User Requirements
- ✓ What the Competition Is Doing
- ✓ Analysis of Legislation and Budget Constraints
- ✓ Where the Opportunities Are

... A Competitive Advantage for Federal Computer Security Vendors

You rarely have access to this kind of market intelligence in *any* market, let alone one as complex and volatile as the federal computer security market.

But INPUT has just released a report entitled *Federal Computer Security Market, 1990-1995* that gives vendors access to highly focused research on market and technology trends, federal user requirements, competitive trends, and where current and future opportunities lie for those flexible enough—and well-enough informed—to exploit them.

A report with this much distilled data and analysis would be worth full price to any vendor serious about selling to the federal government.

But if you act before November 30, 1990, you can pay \$175 less than the regular list price for the report—a savings of 10 percent!

Changing user requirements, the dictates of six different security watchdog agencies, the contradictory pronouncements of Congress—these all make the security market tough to plan for, tough to understand, tough to penetrate efficiently. But INPUT's report concentrates man-years of research and decades of federal market experience into a sharply focused competitive weapon that helps you do all of this, and more.

Exhaustive

INPUT systematically explores the market, the requirements of users, the activities of competitors, and the opportunities hidden in millions of words of federal reports. We then give you answers to the questions that will have the biggest impact on your success:

- What will the actual effect of the Computer Security Act of 1987 be in an age of tightening budgets?
- Exactly what roles do the GSA, OMB, NSA, NIST, GAO, and PCIE each play in the computer security market?
- How has the move toward more open networking systems opened opportunities for security vendors?
- How has bureaucratic maneuvering reduced the importance of the NSA and NIST staffs dedicated to computer security?
- How big is the market? Where are the real opportunities in a market that is showing a sluggish overall growth rate right now? Where will the future opportunities be?
- What trends in technology and the industry will affect agencies' security requirements through FY 1995?
- What are the major competitive trends in federal computer security?
- How big are the vendors in this market, and how dependent are they on the federal market for their revenues?
- How are teaming patterns changing?

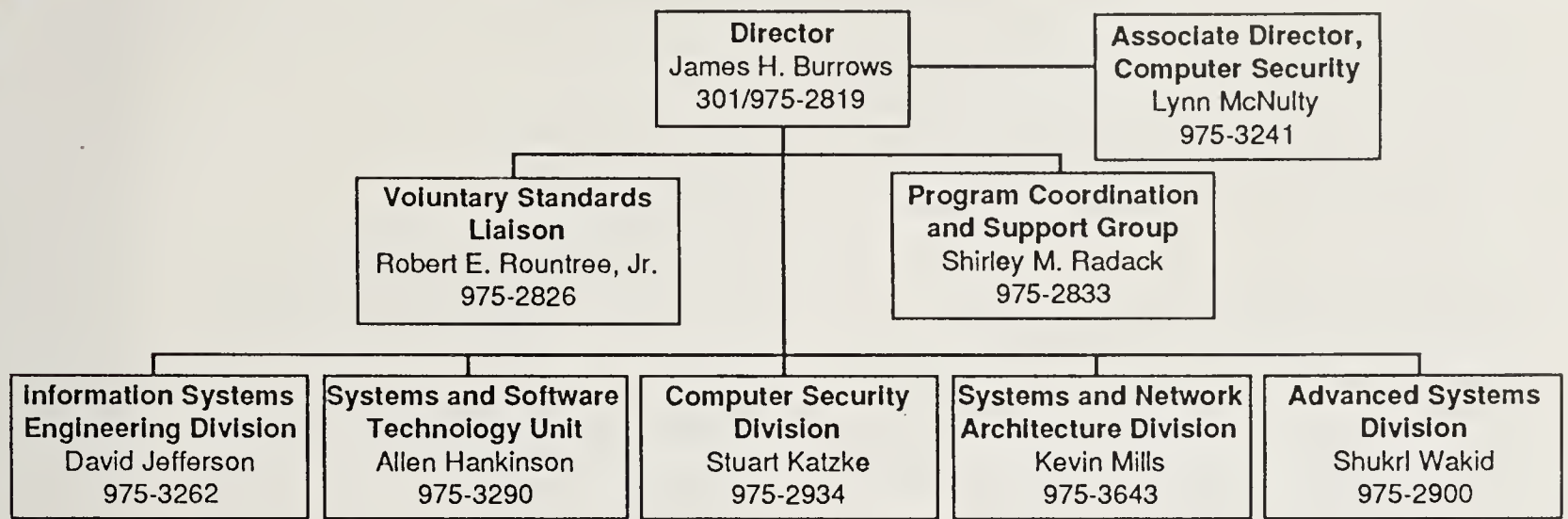
And hundreds of other answers about every aspect of the federal computer security market. This report is an exhaustive survey that leaves readers with information they can use immediately for long-term planning and in their daily marketing and sales efforts.

Practical, Tactical Intelligence

One of the things that sets INPUT's federal reports apart is their provision of information that can be used directly to enhance sales. We combine the decades of experience of our senior staff with targeted survey data and thorough research in existing agency documentation to find unexploited opportunities. We also use our sophisticated research infrastructure to answer questions about the people and institutions that make your market:

- What are the product selection criteria of the major players?
- What are their acquisition plans now and in the future?
- How important are ease of implementation, training features, price, and the vendor's federal experience in the procurement decision?
- What do the big agencies require from vendors in software, encryption, support, price, hardware, training, and experience?
- What roles will GSA schedules, RFPs, and other procurements play?

National Computer Systems Laboratory



THE NAMES, PHONE NUMBERS, and responsibilities of the key liaison personnel in the National Computer Systems Laboratory are just one example of the kind of detailed, practical intelligence you get in *Federal Computer Security Market, 1990-1995*. This illustrates an INPUT specialty: information for day-to-day use in the market that exists, not abstract theorizing.

- How do large users evaluate vendors' security performance?
- What type of vendors do they prefer?
- What do agencies want vendors to do to improve their products and services?
- What impacts will European computer security standards have on your business, and how can you accommodate them?
- What have the various agencies done and not done to comply with CSA 1987? What kind of opportunities does this afford you?
- What are the likely futures for computer security measures and agency requirements two to five years out?

And more on the specific developments that can give you and your company a competitive edge in a market where good information is more important than ever.

This report has it all. If you need information to help you understand the market as a whole, it's here. If you need intelligence to help you understand your competitors, it's here, too. And if you need analysis to help you understand specific sales opportunities, you can find it here as well.

To duplicate this study would require not just the creation of a highly efficient research machine from scratch, but several years of actual digging through the paper blizzard that hides some of the most lucrative contract opportunities in the federal computer market from view.

But to get the study results requires nothing more than a couple of minutes of your time to specify your order.

Why not take that time now? Fill out the enclosed order form and send it in today.

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Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

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Are You Ready for Outsourcing?

- ◆ How can you make the Go/No Go decision?
- ◆ What are the rewards? The pitfalls?
- ◆ How big is the market?
 - ◆ What kinds of companies have succeeded best?
 - ◆ How should you structure outsourcing relationships?
 - ◆ How will outsourcing change your organization?

Get Ready—Get the Answers— With INPUT's New Report!

The potential rewards of outsourcing are tremendous. But so are the risks. A new report from INPUT entitled *Information Systems and Outsourcing—A Strategic Assessment* puts outsourcing in perspective by giving IS management and vendors a crisp analysis of risk and reward potential in the context of today's information environment!

Analyses of the major outsourcing vendors, the increasing role of professional services, contract and personnel pitfalls, market size and growth rates, and a comprehensive conceptual framework IS management can use to evaluate outsourcing on a case-by-case basis—these are all provided by INPUT's report. But the report also covers a

historical perspective on outsourcing, major market forces, vendor selection criteria, organizational impacts, analyses of vendors and their strategies, and more.

And if you act before December 14, 1990, you'll pay \$150 less than the regular list price for the report—a savings of 10 percent!

There is no question that outsourcing represents a major shift in focus for both vendors and users. The only question is who will benefit most. We believe that to exploit the outsourcing opportunity requires the most comprehensive information and the best analysis available. *Information Systems and Outsourcing—A Strategic Assessment* is researched and written to give you exactly that.

Information Systems and Outsourcing A Strategic Assessment

Outsourcing—Past and Present

- A Historical Perspective
- What Is Different
- A Working Definition

Information Systems Perspectives

- Driving Forces
- IS Organization in the 1990s
- Information Systems Strategy and Outsourcing
- Outsourcing Opportunities

Outsourcing and Vendor Capabilities

- Vendor Categorization
- Systems Operations and Systems Integration
- Vendor Support for Organizational Issues
- Vendor Capabilities
- Outsourcing and Systems Management

Outsourcing—Decision and Selection

- Outsourcing Decision Factors
- Client/Vendor Relationship
- Vendor Selection
- Managing the Vendor
- Organizational Impacts
- Insourcing
- Information Systems Outsourcing Benefits

Conclusions and Recommendations

Adding Value

Ever since Kodak contracted out for the majority of its information systems function, companies have been wondering how they might reconfigure their IS effort to allow them to concentrate on the area where they add the most value: the architecture, planning, and implementation of strategic systems. INPUT's report tackles that issue, along with others like:

- What are the key benefits to be derived from the five basic categories of outsourcing?
- What are the various types of outsourcing relationships and what are their advantages and disadvantages?
- What are the pitfalls in managing the ongoing vendor relationship?
- What are the key factors in analyzing whether you should outsource?
- What kind of organizational impacts can you expect from an outsourcing relationship?
- How can you define *business* objectives for outsourcing relationships?
- How can you structure these agreements to give your company the greatest possible benefit?
- How can you resolve the inherent conflict in the perspectives of the organization and the IS department?
- How will the major market forces of globalization, increasing rate of business change, and specialization affect the outsourcing trend?

In short, INPUT's report examines all of the pressures related to outsourcing, and analyzes in detail how they are likely to transform the IS organization in the 1990s.

The Vendor View

But INPUT does not stop there. Our researchers also provide valuable information on outsourcing vendors, the market they play in, and how their product and service offerings are being forced to evolve. The report answers your questions about:

- How big is the market now, how fast is it growing, and how big will it be for each of the next five years?
- What are the outsourcing strategies of eight key competitors in this field?
- How do outsourcing buyers rate various vendor capabilities in order of importance?
- Where are the best outsourcing opportunities today? Where will they be in the near future? What are the forces driving the market in that direction?
- What types of outsourcing relationships are becoming common among users and vendors?
- How is the willingness of users and buyers to make longer-term commitments to outside vendors for larger contracts affecting the outsourcing market?

And other questions you have to have answered if you are going to be able to shape your business so that you can reap outsourcing's rewards.

Clear, Practical Recommendations

Never has an issue had so much potential to change the way you do business. Never has an issue involved so many different aspects of information management. Never has an issue carried so many possible benefits, or had the potential for negative impacts.

Outsourcing Benefits

Outsourcing Category	Benefits						
	Costs		Skills Access	Rapid Response	Use of Skills		Management Time
	Oper.	Cap.			Vendor	IS	
Applications management	X	X	X	X	X	X	X
Systems operations	X	X	X	X			X
Transition management			X	X	X	X	X
Applications maintenance	X			X		X	X
Systems integration			X	X	X		X

THE FIVE BENEFITS of outsourcing are used to form a matrix with the five different outsourcing categories to help IS management determine where the best opportunities lie for their companies.

Outsourcing is unique. And you can't just ignore it. IS managers and vendors are going to be forced to make a conscious decision on what to do about outsourcing.

That's why INPUT's report on *Information Systems and Outsourcing—A Strategic Assessment* can be so valuable for you. We put all of the resources of our sophisticated research infrastructure behind the effort to come up with information on this subject. And then we put some of the finest minds in the business to work on it to come up with incisive analysis and clear, practical recommendations for action.

Why not put this powerful research and analysis to work for you? Use the enclosed order form to order your copy of *Information Systems and Outsourcing—A Strategic Assessment* today.

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How Can You Find— and Make the Most of— International Network Service and Support Opportunities...?

- ◆ How big is the market?
 - ◆ Where is it growing fastest?
 - ◆ What do users say they require?
 - ◆ Who are your competitors?
 - ◆ What is driving growth?

...INPUT Makes It Easy with a New Network Service Market Report!

As networking becomes a strategic necessity for modern business, the revenue opportunities in network service and support will grow dramatically. But how can a service organization best take advantage of those opportunities? A new report from INPUT, entitled *Network Service Opportunities*, analyzes these opportunities in detail, showing you how to shape your service offerings and competitive strategies to make the most of the most exciting new growth markets in customer service.

The report represents more than a man-year's worth of targeted research into the American and European markets, and is a superb value at full price. But INPUT is offering you the opportunity to have all of the benefits of this research at a considerable savings.

If you act before December 31, 1990, you'll pay \$250 less than the regular list price for the report—a savings of over 10 percent!

The opportunities for network support are there; but they're not always easy to find. INPUT's research has been carefully designed to track down and highlight those opportunities, giving you the information you need to focus your resources where they can earn you the highest possible return.

Strategic Analysis

The market for networking is diverse and confusing, and the market for network services reflects these characteristics. INPUT's *Network Service Opportunities* helps you unravel the market to see where your company can make money in a whole new growth area, answering strategic questions like:

- How big is the network services market in the United States and Western Europe today, and how fast will it grow over the next five years?
- Which market segments and services will grow most rapidly? Least rapidly?
- What are the four key factors driving the markets for network service and support?
- Which four factors are inhibiting growth in these markets?
- What do users really require from network service providers, and how do those requirements change as users grow?

Tactical Insight

In addition to these large-scale concerns, the report offers insight into the day-to-day tactical questions that you have to answer to keep your company growing:

- How do users rate the relative importance of hardware maintenance, systems software support, applications support, network monitoring, network/systems operations, communications evaluation, application evaluation, network customization, and network planning in the United States and Europe?

Network Service Opportunities

Market Forecast

- Network Service Components
- Market Forecast
- Factors Affecting Growth

Key User Needs

- User Networking
- User Network Service Requirements
- Future User Requirements
- User Attitude toward Systems Operations
- Source of User Services
- User Requirements for Vendor Services
- User Interview Comments

Vendor Requirements

- Need for Focus
- Network Development
- Key Vendor Requirements
- Factors Influencing Network Service Development
- Opportunities
- Competitive Environment
- New Skill Requirements

Recommendations for Customer Service

- How can you fight the minitrend toward self-service among experienced users in large companies?
- How will the user demand for open networking standards affect your service offerings? How will you differentiate your company?
- What new skills should service organizations cultivate to be able to exploit the new requirements for network support?
- How can you design and deliver services to support the large number of inexperienced network users?
- How can you accommodate the increasing demand for design, consulting, and management skills in your service offerings?
- How can you structure service offerings that will satisfy the needs of all customers, large and small, experienced and inexperienced?
- How do successful network services vendors rate the relative importance of multivendor environments, larger skill sets, software compatibility, and other market issues?

The report also goes beyond evaluating these tactical issues to offer you specific, research-based analysis and recommendations for future action in this changing business.

We Know the Market

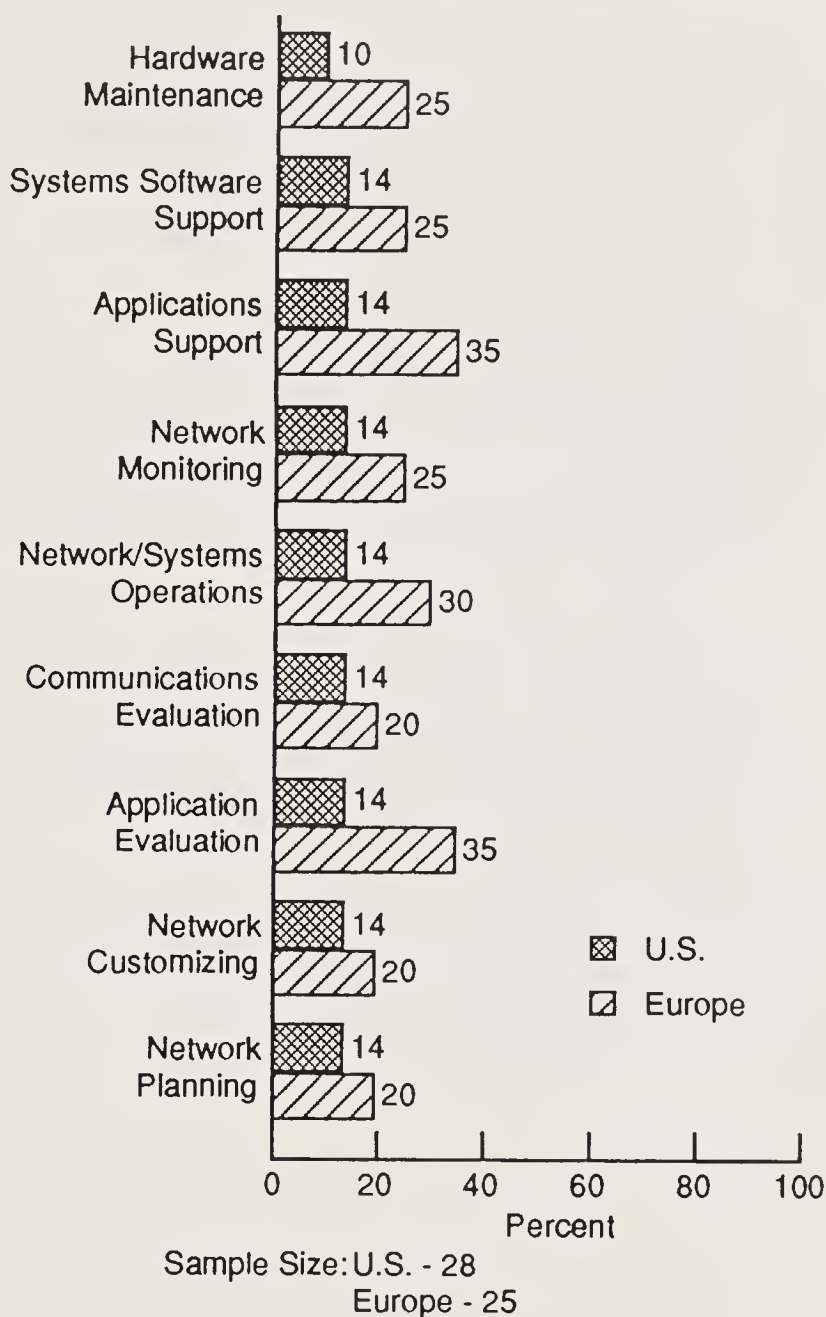
INPUT's customer service analysts have decades of experience on both the user and vendor sides of the network service question. They have watched the market evolve from the beginning, always noting growth areas, key trends, and the major characteristics of successful vendor strategies.

And now they have distilled their experience and targeted market intelligence into a single-volume report designed from the ground up to guide you to the most promising opportunities in a very important market.

To make the most of those opportunities, you have to have excellent information and incisive analysis.

INPUT's *Network Service Opportunities* offers you both. Use the enclosed order form to order your copy today.

In-House-Provided Services



THE THREAT of do-it-yourself network service is quantified in this exhibit from INPUT's report on *Network Service Opportunities*.

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Customer Service Organizations— How to Recover from Declining Equipment Revenue Growth

- Companies must reduce dependence on low-growth markets in order to survive in the 1990s.
- Typically, 75% of customer service revenues are provided by equipment maintenance, which is growing less than 4% per annum.
- Use INPUT's report to find out how to enter systems operations and disaster recovery markets using existing skills and resources.
- Find out how to develop the service into a complete 'total solution' package.

- Systems Operations
- Disaster Recovery

The key to declining
equipment revenue
growth

Systems Support Opportunities for Customer Services Vendors in Western Europe, 1990-1995

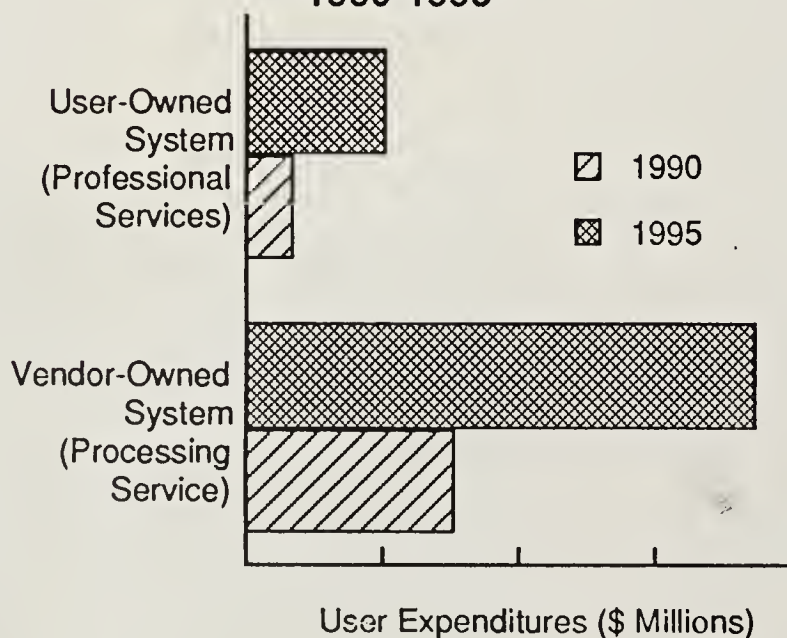
Are you interested in finding out how to increase your revenues by 20%, rather than depending on the current low growth rate for equipment maintenance revenues?

INPUT's new report on systems operations (facilities management) and disaster recovery can help you achieve higher growth.

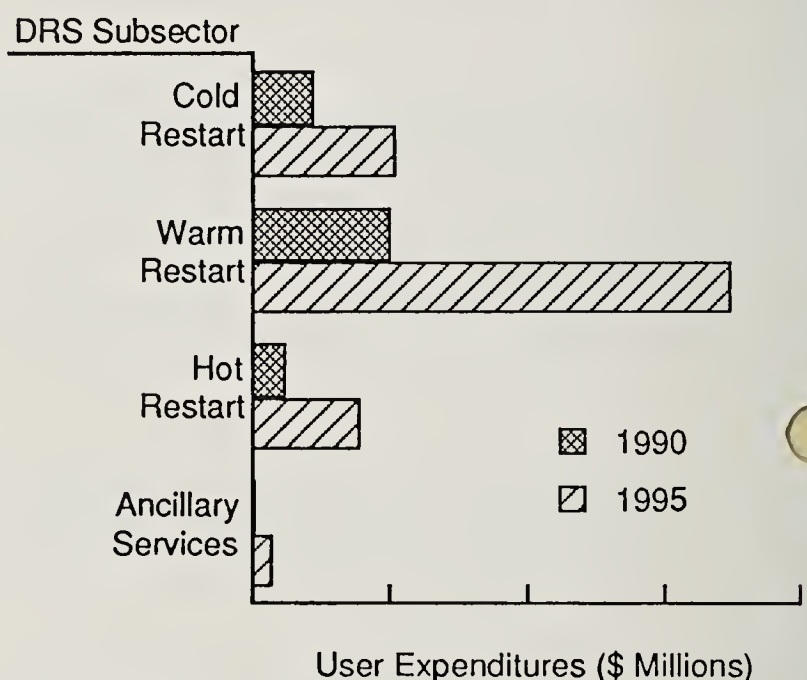
Entitled *Systems Support Opportunities for Customer Services Vendors in Western Europe, 1990-1995*, the report addresses the issue of falling growth rates from equipment maintenance revenues and gives valuable strategic guidance on entering two new markets:

- Systems operations
- Disaster recovery

Western Europe Systems Operations Market Growth 1990-1995



Western Europe Disaster Recovery Services Subsector Market Growth—1990-1995



INPUT believes that these markets are available to customer service organisations almost immediately, using existing skills and resources. INPUT's report puts forward a strategy for entering each market, providing you with vital information such as:

- Size of unpenetrated market
- Market segmentation
- Competitive environment
- Market size and growth forecasts by country
- User levels of interest

INPUT's Research Studies

Yes!

Please enter my
order as described:

*Systems Support Opportunities for Customer Services Vendors
in Western Europe, 1990-1995* report at the fee of \$2,550 each.

TERMS OF PAYMENT

Payment in full is due within 30 days of invoice date.

☐ Enclosed is my check in the amount of \$_____.

☐ Bill my company on purchase order number _____ in the amount of
\$_____.

California clients: Please add applicable sales tax on 70% of purchase price.

Connecticut clients: Please add 8% sales tax on the total amount.

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Organization

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Title

Address

Telephone

Signature

Date

Accepted By INPUT:

Signature

Name

Title

Date

Disaster Recovery

INPUT believes that the disaster recovery market offers good growth potential, as it is currently relatively unpenetrated and there is a high level of user interest. The increasingly high reliance on computer equipment within industry is also driving the market, as users realise the effect that a disaster could have on their business operations.

INPUT's report gives valuable information on this market. It breaks the market down into three sectors:

- Cold restart
- Warm restart
- Hot restart

INPUT's report will tell you which sector is growing the fastest and will highlight some of the differences in the major country markets.

The report also warns of possible pitfalls to avoid when setting up a disaster recovery service, and lists essential elements that a disaster recovery service should contain. This is essential information for companies traditionally deriving revenues only from maintenance activities.

Systems Operations

The systems operations market is slightly different from that of disaster recovery. User levels of interest are lower, but the market is less penetrated. INPUT divides the market into two sectors:

- User-owned equipment
- Vendor-owned equipment

INPUT's report explains user attitudes to this service and describes the choices available to vendors when setting up a systems operations service. It describes two strategies and tracks the probable future development of each. The report can be a valuable contribution to planning for companies considering entering this market. By adopting INPUT's strategy, companies can reduce the need for substantial investment in a market that is traditionally costly in terms of skills required.

Service Packaging

The report discusses this important future challenge: to be able to be a client's sole provider of service for all computer equipment, taking care of not only the maintenance, but also the operations, contingency planning and consultancy.

REPORT CONTENTS

Revenue Growth Opportunities

- The Need for New Markets
- Market Opportunities
- Packaging Total Solution Service

Systems Operations Opportunities

- Drivers and Inhibitors
- Participants
- Competitive Pressures
- Country Market Forecast and Growth
- Service Strategies
- Problems Management Leverage
- User Attitude
- Need to Market
- Vendor Challenges

Disaster Recovery Service

- Drivers and Inhibitors
- Participants
- Country Market Forecast and Growth
- Subsector Definitions and Market Growth
- Level of Service
- Vendor Opportunities
- Potential for Success
- Stimulating Interest
- Service Packaging
- User Interest Levels

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Network Support— A Customer Service Opportunity

INPUT's Report Will Help You to Work Out Your Strategies for Network Servicing

It will provide you with:

- market size for 1990 in Europe and the USA
- market forecast for 1995 and growth rates
- recommendations on how to develop network servicing

and will discuss:

- user and vendor issues
- the likely future development of networks
- the impact of future developments on service

**The network servicing
market is confused
and badly defined**

**Accurate market
information is
therefore essential
for success**

The Challenge of Network Service in

Criticality of Data Networks Demands Full Service Solutions

Data communications networks are now becoming critical to user organisations, but the service and support necessary to maintain uptime and accessibility remains fragmented. Users are left exposed in a vital area of their information systems infrastructure, as only a few vendors offer comprehensive approaches to network support.

A Confused Market

There is a high degree of confusion in the network servicing market. One of the problems is that there are differences of opinion over what comprises a network; users tend to take a wider view of networks than vendors. It is essential, therefore, that vendors involved in this market should be aware of these differences in order to understand the needs of their clients. INPUT's report identifies these issues.

Market Inhibitors and Drivers

The report, *The Challenge of Network Service in Customer Services*, discusses the forces inhibiting the growth of the market. One of these is the reliability of the equipment which reduces the requirement for maintenance and hence the opportunities for vendors. Also, there is a relatively high percentage of users who opt for self-service (usually large and experienced users) and around one-third of users do not recognise the existence of a formal network service contract. Vendors need this type of market size and growth information in order to plan their strategies.

The report also identifies the driving forces for network servicing, such as:

- a growing user base
- many new applications

Report Contents
Market Opportunities
<ul style="list-style-type: none">• Market forecast and growth• Competitive environment• Service opportunities• New skill requirements
Key User Needs
<ul style="list-style-type: none">• User networking• Network service requirements:<ul style="list-style-type: none">- access- small users- inexperienced users- service needs• Future user requirements• Systems operations• Source of service• User comments
The Vendor Challenge
<ul style="list-style-type: none">• Network development• Key vendor issues:<ul style="list-style-type: none">- multivendor environment- wider range of skills- software compatibility- wider range of service• Service development:<ul style="list-style-type: none">- standards- intelligent buildings• Opportunities:<ul style="list-style-type: none">- network disaster recovery- network implementation• Vendor recommendations

INPUT's Research Studies

Yes!

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The Challenge of Network Service in Customer Services report
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Unit 1: The History of the English Language

1.1 The English Language in the 15th Century

1.2 The English Language in the 16th Century

1.3 The English Language in the 17th Century

1.4 The English Language in the 18th Century

1.5 The English Language in the 19th Century

1.6 The English Language in the 20th Century

1.7 The English Language in the 21st Century

Customer Services

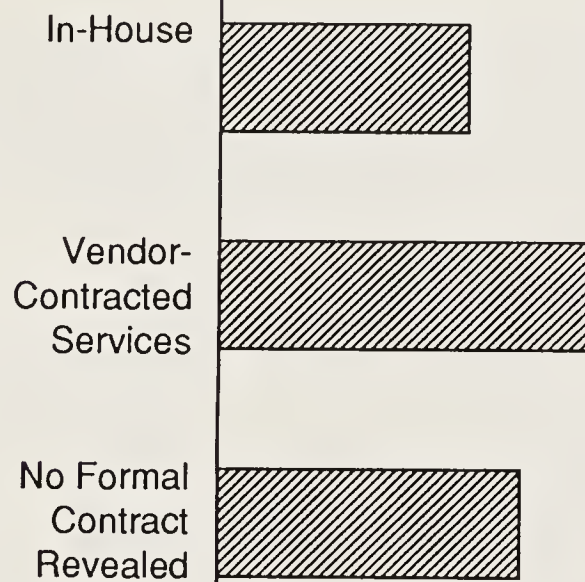
Guidance for Vendors

INPUT has studied the market for network servicing and has assessed its potential growth and direction. As a result of this, INPUT has formulated some recommendations for vendors. These cover the new skill areas that INPUT believes vendors need to acquire to be able to take on multivendor network installations. The nature of these installations calls upon skills that are very often outside the traditional domain of customer service. INPUT has also carried out research into user attitudes. Vendors need to know users' views if they are to fully satisfy the needs of their clients. One important user requirement is for access to the network on demand, which implies a need for early detection of potential network problems.

This is an important strategic report for marketing and planning executives. It will help you to position your company for the 1990s.

User Source of Network Service

Service Source



Percentage of Users

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Identify and Assess Opportunities in the Rapidly Changing DLA Market...

Defense Logistics Agency Information Services Market

This report will help you develop:

- FORECASTS for the market opportunities at DLA for the next five years by understanding the factors affecting DLA information systems modernization
- COMPETITIVE STRATEGIES in this market based on a thorough knowledge of the competitive environment—leading suppliers, shares, and strategies
- Sales approaches to the DLA that take into account the agency's procurement policies, procedures, and vendor preferences
- MARKETING PLANS that consider major initiatives, acquisition plans, and budget trends

This report contains:

- Market forecasts through 1995 for major market segments
- Procurement procedures and trends
- Budget trends and other funding issues that will impact the market
- Recent and upcoming initiatives
- Complete background and organization of the DLA

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The Key to Success in DLA Information Strategic Information on Acquisition Plans and Trends

This new study, *Defense Logistics Agency Information Services Market*, was undertaken to keep you up to date with the rapid changes in DLA information systems acquisition practices.

Defense Logistics Agency Information Services Market

- Systems Operations
- Telecommunications
- Software Products
- Professional Services
- Processing Equipment
- Computer Equipment
- Office Information Systems
- Electronic Data Interchange (EDI)

Agency Perspectives

- Agency Overview
- Major Information Systems Acquisition Plans
- Acquisition Plans and Procedures
- Vendor Preferences
- System Integration Trends
- Centralized/Decentralized Directions
- Use of IS Vendors

Vendor Views

- Contracted Services Changes
- Contract Functionality
- Contracting Views
- Marketing Perceptions

We Unravel the Opportunity

The report focuses on providing you with a clear picture of the agency—its organization, mission, and directions—along with strategies on how to plan for and conduct business in this market. This report gives you the information you need to establish successful marketing strategies and to select addressable opportunities in DLA information services. The report summarizes the major DLA initiatives and programs and the markets they will affect.

The report examines agency requirements, preferences, and perceptions that impact contractors of information systems and services. Current DLA purchasing patterns and procedures are also covered in the report.

We Provide Hard Analysis of the DLA Market

The report provides a comprehensive market analysis of the DLA's potential. We forecast the information services market by delivery mode, and identify the critical market issues and budgetary and economic trends that are guiding market growth. Special attention is devoted to analyzing how the agency is striving to modernize in the face of continuing budget cuts. User trends, such as increasingly decentralized computing, are also examined.

Services—

The report provides forecasts for the following vendor service modes at DLA: hardware, software, professional services, integration services, systems operations, processing services, telecommunications, office information systems, and EDI.

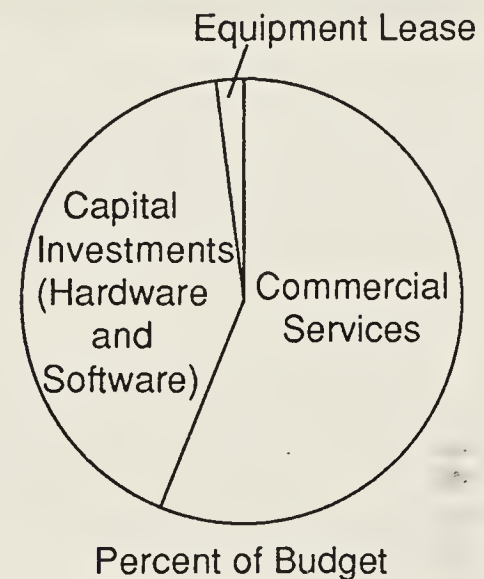
Based on Information From the Field

This report is based on information collected in an extensive INPUT survey of agency representatives and vendors. Data collected from agency and government sources and leading vendors summarizes current status and views on:

- Future use of information systems
- Strategies and market perceptions
- Important vendor characteristics and services

As a comprehensive analysis of the important competitive factors and considerations in the DLA market, this report is an indispensable planning tool to information services executives and managers who want to take advantage of DLA opportunities.

DLA Information Services Market Obligations Forecast FY 1990-FY 1995



Who's buying, and what they spend, is just one kind of market data provided in this report.

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How to Find and Manage the Market Opportunities in Federal Processing Services and Systems Operations...

Federal Processing Services/Systems Operations Market, 1989-1994

This report will help you:

- FIND specific agency opportunities in this market
- DEVELOP marketing strategies and services that will bring agency business
- IDENTIFY competitors and potential teaming partners
- REFINE your bidding and pricing strategies to maximize profitability
- IMPROVE agency satisfaction with your services

The report contains:

- Market forecasts through 1994
- Agency requirements and purchasing trends
- Competitive analysis
- Recommendations

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Develop Your Successful Strategic/Market Plan from Our In-Depth Industry Coverage

The federal government market for processing services and systems operations is experiencing new growth. The federal government's increasing reliance on information technology to improve productivity and accommodate staffing inadequacies provides numerous opportunities for vendors that supply transaction processing, batch, and operational support services.

This new report from INPUT, *Federal Processing Services/Systems Operations Market, 1989-1994*, shows you where and how to compete in the federal market for operational support. This report is a comprehensive analysis of the factors driving this market's growth, providing strategies needed to succeed in the intensifying competitive environment. It answers the important questions you have about this market.

<i>Federal Processing Services/ Systems Operations Market</i>
Market Analysis and Forecast, 1989-1994
<ul style="list-style-type: none">• Historical Perspective• Budgetary Constraints• Software Integration and Productivity Improvements• Artificial Intelligence• Leading Vendors
Federal User Requirements and Trends
<ul style="list-style-type: none">• Problems and Issues• Budget and Application Distribution• Agency Perceptions• Acquisition Plans and Preferences• Projected Trends in Processing Services and Operational Support
Competitive Trends
<ul style="list-style-type: none">• Vendor Participation• Vendor Market Perceptions• Vendor Contracting Views• Trends• Recommendations
Key Opportunities

Why is the federal processing services/systems operation market growing?

This report presents INPUT's analysis of the federal market for processing services and systems operations (operational support). It analyzes how market growth is being encouraged by the increasing versatility of processing services and operational support and the trend towards automation of government operations.

The report identifies the market segments and applications that will grow rapidly and the markets that will experience slower growth. The growth of systems operations is a focus of this report. The report also discusses the factors that will sustain the market despite its maturity and budgetary constraints, including the government's facilities limitations and its efforts to modernize and improve efficiency.

How do I market to the various agencies?

Vendors in this market need to maximize their marketing efforts towards current and future government requirements in key applications. By analyzing the types of functions government agencies are contracting out, this report helps to focus your product and service offerings in high growth segments.

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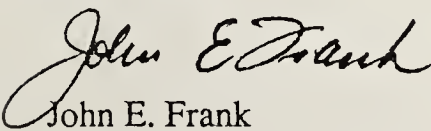
Gain Insight into the Federal Processing Services/ Systems Operations Market

The federal government's reliance on information technology to improve productivity and overcome staffing inadequacies has spurred growth in the processing services and systems operations markets. INPUT's forecast for the next five years calls for the market to continue its growth despite budget restrictions and regulatory conditions impacting the federal marketplace.

The just-completed report on the *Federal Processing Services/ Systems Operations Market, 1989-1994* focuses on the current responses of the federal agency and vendor communities to issues, trends, and changing needs of this market. It also analyzes the government's continued requirements to support a wide range of applications to develop recommendations to vendors for better focus of their product offerings.

To receive your copy of this informative report, please mail or fax the enclosed order form, or call INPUT at (415) 961-3300.

Best regards,



John E. Frank
President
INPUT, INC.

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YES! I need to find and manage the market opportunities in federal processing services and systems operation! I need INPUT's report on the *Federal Processing Services/Systems Operations Market, 1989-1994!*

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The report also explores marketing and sales issues unique to the federal government, including procurement policies and preferences, vendor selection criteria, and planned uses of contractor services in operational support.

What are the most appropriate pricing strategies in this market?

Successful pricing strategies are vital to capitalize on agency opportunities in this market. The report includes recommendations on how to improve margins and gain competitive advantage through cost controls and alliances.

The report identifies the leading vendors that have established significant shares of the federal government's processing services and systems operations market. Hardware, software, and service vendors can use the report to identify specific agency opportunities, possible teaming partners, and appropriate bidding strategies.

Features and Benefits of this Report

This study is based on interviews with agency officials and vendor representatives, as well as data collected from published government sources. (Agency program data and updated vendor information was collected by INPUT during 1989.)

The survey illustrates the views, in both the government and the industry, regarding:

- Current and future agency use of processing services and systems operations
- Leading vendors and performance evaluations
- Strategies
- Issues and trends

Federal Market Pressures

- Staff shortages
- Labor-intensive process
- Mission contracting
- Cost-cutting
- High attrition

Federal Processing Services/Systems Operations Market, 1989-1994 is a complete assessment of agency requirements, competition, and evolving trends and issues. It provides market intelligence to marketing and planning executives to assist them in developing successful marketing plans, assessing capabilities, and analyzing the competition in contractor-supplied processing services and systems operations.

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- ▲ Changing agency requirements
- ▲ Pressure to share risks
- ▲ Pressure to do more with less
- ▲ Attacks on the *concept* of systems integration

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You can have a report that explains in detail the crucial dynamics of the Federal Systems Integration market today.

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a savings of 10%!**

A brand new revision of INPUT's respected survey, *Federal Systems Integration Market, 1989-1994*, gives executives who must sell into this market invaluable intelligence tailored specifically to their needs—and to the needs of a gigantic market in a state of flux.

The rules for successfully penetrating this market will never be the same. INPUT's new report tells you how they've changed, and helps you turn those changes to your advantage.

Of course the report gives you a broad market overview, seasoned with the combined experience and expertise of a research staff that knows more about how Washington works than any other computer market research firm. But the report also gets down to the nitty gritty, giving you detailed analyses of:

- What the requirements of the different agencies are today, and how they are likely to change over time;
- Who the major players are in federal systems integration, and how they can give flexible competitors new opportunities for increasing market share; and
- When and how the major contracts will be put out to bid, and who will be involved.

And that's not all...

Six Ways the Market Is Changing

The report also details the six major pressures on the federal systems integration market, and explains how they are acting in concert to change the way you have to do business:

- **Pressure for Improved Productivity**—The overall constraints of the Gramm-Rudman budget axe and the increasing scrutiny of information systems expenditures could seriously affect you. The report offers an analysis.

<i>Federal Systems Integration Market, 1989-1994</i>
<ul style="list-style-type: none">• Market Analysis and Forecast• Agency Requirements• Systems Integration Vendors• Key Opportunities
Agency Perspective
<ul style="list-style-type: none">• Hardware Systems• Systems Applications• Agency Perceptions• Case Studies of Contracts• Acquisition Plans and Preferences• Projected Trends
Vendor Perspective
<ul style="list-style-type: none">• Vendor Participation• Vendor Market Perceptions• Vendor Contracting Views• Trends

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Dear Colleague:

Marketing systems integration products and services to the federal government just got a whole lot easier.

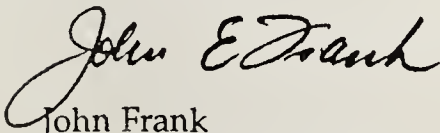
INPUT recently released the newest edition of its respected survey of the Federal Systems Integration Market, 1989-1994. This publication is written for just one audience: marketers who must master the intricacies of this evolving market. The report clarifies the complex trends, changing policies, and shifting growth rates of government systems integration—and then offers clear recommendations for future action.

Systems integration is growing fast. In fact, it is one of the star segments of the government market. But the influence of budgetary concerns, new policies, scarce personnel, and changing agency requirements make the market's growth anything but easy to exploit.

INPUT's report offers guidance: timely data, some difficult-to-obtain market intelligence, and a lot of clear recommendations for making the most of this vast opportunity.

So order the report today. Make the most of it!

Yours sincerely,

A handwritten signature in black ink, reading "John E. Frank". The signature is written in a cursive, flowing style.

John Frank
President, INPUT INC.

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survey, 1989-1994

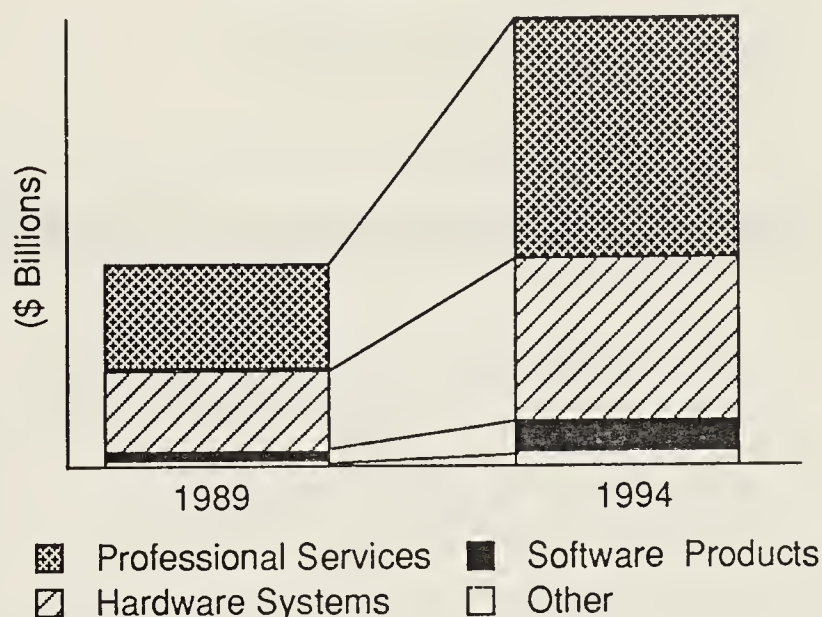
- **Pressure to Redesign Aging Systems**—Government hardware and software systems are patchworks with no integrated design. That means tremendous opportunities for systems integration work, which the report analyzes in some detail.
- **Pressure to Overcome Staff Shortages**—Government agencies are having a hard time hiring and retaining qualified technical staff, so they must offload technical work onto the private sector. INPUT's report discusses how you can turn this trend to your advantage.
- **Pressure to Maintain Fair Competition**—The entire process of awarding contracts has slowed significantly. INPUT offers some insight on how to avoid the worst delays, and how to minimize their impact on your company.
- **Pressure to Share Risks**—Agencies now want vendors to assume some of the financial risk of large systems integration contracts. The report analyzes how this problem could affect your operations, and offers guidelines on risk-sharing.
- **Pressure to Justify Integration**—Recently, the GSA characterized systems integration as a "Grand Design" and suggested that it would not work. INPUT surveys the market's response.

How To Cash In

The game has definitely changed. There's a new emphasis on project teams, joint ventures, subcontracting, budgeting, and project management. And above all, there is an overwhelming need for vendors to understand the details of the procurement process and how they can affect the bottom line.

Executives that understand how all of these changes are working to change their businesses can make intelligent decisions in the new Federal systems integration market, which is forecast to grow at a rate significantly faster than other technology markets over the next five years.

Systems Integration Markets
GFY 1989-1994



OVERALL GROWTH is useful information, but knowing which segments are growing fastest can help government marketers more. INPUT's report gives differential growth rates for the most important market segments.

And INPUT's *Federal Systems Integration* report gives you all the information you need to make those decisions today.

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Professionals Who Need The Best Available Analysis of Government Software and Services Markets...

- ▲ Critical intelligence on future trends
- ▲ Acquisition criteria and methods
- ▲ Certification pitfalls
- ▲ The move toward standardization
- ▲ Competition

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INPUT has just released the best, most up-to-date, and most comprehensive guide to the complex market for government software and services money can buy.

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Federal Software and Related Services Market, 1989-1994

- Market Analysis and Forecast
- Federal Requirements and Trends
- Competitive Trends

Agency Perspectives

- Changes in Product/Service Acquisitions
- Hardware Platforms
- Selection Criteria
- Agency Use of Ada
- Software Technology Trends
- Fourth-Generation Languages
- Artificial Intelligence
- Impact of Standards and Certification
- Acquisition Methods
- Testing and Acceptance Procedures
- Follow-On Support

Vendor Perspectives

- Vendor Market Participation
- Market Perceptions
- Selection Criteria
- Trends for Specific Products
- Factors Impacting the Market
- Marketing Strategies

A completely updated revision of the acknowledged "bible" of government software and services marketers, INPUT's report on the *Federal Software and Related Services Market, 1989-1994* is packed with the information you've got to have to make your marketing plans work.

Critical intelligence on trends, agency activity, acquisition criteria and methods, testing and acceptance procedures, competition—the report analyzes all of the factors that define the competitive edge in your business.

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- Analyzes the wide-ranging impacts of increased functionality in off-the-shelf packaged software;
- Investigates the increasing perception of agency requirements as having more similarities than differences;
- Details the demands that the government do more with less;
- Highlights current and future plans for agencies' use of Ada;
- Examines the larger impacts of CASE tools, artificial intelligence, UNIX, and other technological developments on the government market as a whole.

And more...

But most important, the report puts all of this information and analysis in the context of how larger government market trends will affect the strategies of software and services marketers—today, and in the immediate future.

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Dear Colleague:

The difference between successful and unsuccessful marketing plans in the government software and services arena is good market intelligence, pure and simple.

And INPUT gives you the best market intelligence money can buy.

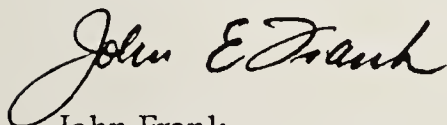
We have just released the latest edition of our report on *Federal Software and Related Services, 1989-1994*, a compendium of difficult-to-obtain data on market trends, specific agency activity, how acquisition criteria and methods are changing, the impact of increased functionality in packaged solutions, and much, much more.

The report gives marketers who must succeed in this most complex and changeable of all software arenas the hard data they need to sell successfully.

The government software and services market is in a state of flux. Marketers who know where to concentrate their resources are going to prevail.

Be one of them. Order INPUT's report today.

Yours sincerely,

A handwritten signature in cursive script that reads "John E. Frank". The signature is written in dark ink and is positioned above the printed name and title.

John Frank
President, INPUT INC.

ORDER FORM

YES! I want the best, most up-to-date, and most comprehensive intelligence on the market for government software and services money can buy!

I understand that I may call my order in, fax it to you at the number below, or send this form in by mail. I understand that I must supply the relevant information for all three of the following sections.

SECTION ONE: MY ORDER

Send me _____ copy (copies) of INPUT's report on
Federal Software and Related Services Market, 1989-1994.

- ☐ I want to pay \$1,350, a savings of \$150 off the regular price. I'm ordering before February 28, 1990.
- ☐ I'm ordering after February 28, 1990, for the regular price of \$1,500.

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CONDITIONS AGREEMENT

The information provided shall be used only by the employees of and within the current corporate structure of the client and will not be disclosed to any other organization or person including parent, subsidiary, or affiliated organizations without written consent of INPUT. INPUT exercises its best efforts in preparation of the information provided under this Agreement and believes the information contained therein to be accurate. However, INPUT shall have no liability for any loss or expense that may result from incompleteness or inaccuracy of the information provided. INPUT reserves the right to change or modify the content of the program in response to changing client requirements.

Software and Related Services Market

Tremendous Potential

The 1989 market is already large: \$1.97 billion. But by 1994, it is projected to reach \$3.8 billion, a compound annual growth rate of 11%.

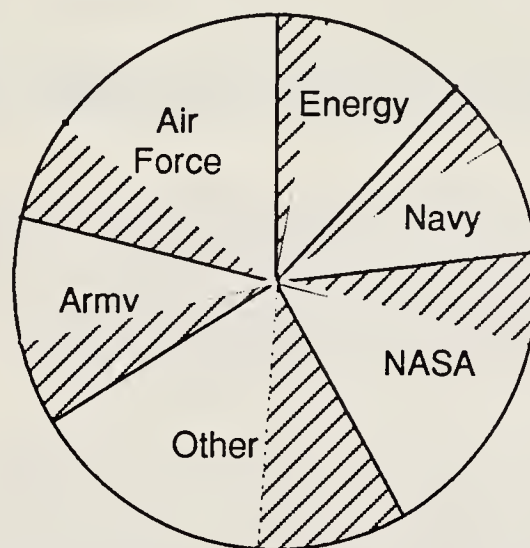
INPUT's report gives you the in-depth information you need to exploit this tremendous potential. Some of the major trends the report examines include:

- A separate and comprehensive forecast focusing on Ada products and services;
- The technical staff shortages plaguing some agencies, and the opportunities this trend opens for all vendors;
- The increasing trend toward software certification, the pitfalls and opportunities it represents;
- The increasing difficulty associated with going it alone in this market, and how various kinds of alliances can open doors for you;
- The increasing inclination toward economical, noncustom solutions in some agencies, in situations where economy and full functionality are in the balance;
- And the growing trend toward standardization, including recent developments in the POSIX and GOSIP markets.

The market for government software and services is growing steadily, but to find the best opportunities there, you need timely and comprehensive market intelligence.

That is the purpose of INPUT's new report on *Federal Software and Related Services, 1989-1994*.

Largest Agency Buyers of Software and Related Services, 1989



☒ Software Products
 ☐ Software Development

THE BIGGEST BUYERS are highlighted in this exhibit from the report. Note the difference between products and development services.

To give you a concise but thorough overview of a rapidly evolving market. To help you make the most of a complex and challenging opportunity. And ultimately, to help you turn the trends in the government software markets to your own advantage.

INPUT is offering you the best tool you could ever have to help you penetrate the government software markets. Why not fill out the enclosed order form and send it in today?

**Call, fax, or mail
your order to INPUT**
to any office listed on the back
of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

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Effective Applications Development Program—1992

The program provides extensive analysis and recommendations for improving the applications development process, based on primary research and a comprehensive data base.

WRITTEN ELEMENTS:

Reports	Applications development success factors, applications development trends and requirements, organizational readiness for CASE, the need for vendor-supplied CASE-related services.
User Profiles	Analyses of the experience of selected organizations using applications development tools and methodologies.
Vendor Profiles	Profiles of companies active in the applications development market, including CASE companies and other software product vendors as well as systems integrators and professional services firms.
Index and Cross-References	Subscribers will receive a diskette that will allow them to look up topics and key words for all published materials in the program.
Research Bulletins	Frequent summaries of research projects, analyses of events and opinions on issues from experts.

SERVICE ELEMENTS:

Telephone Inquiry	Use the "hotline" to obtain answers to your immediate questions.
Consultant Access	Obtain opinions and advice from INPUT executives and consultants through meetings, mail, and telephone.
On-Site Visits	Discuss your issues and concerns, introduce experts to your organization and obtain presentations on industry trends.
Industry or Client Conference	Review the state of the industry and network with executives from other INPUT clients.

Effective Applications Development Program—1992

BACKGROUND

For the first time in a generation there may be potential for broad improvements in the applications development process. The attention being given to CASE environments underlines this opportunity. INPUT's research to date has identified a critical need for further fact-based analysis and action-oriented recommendations for improving the effectiveness of applications development. This need is addressed by a new INPUT service, the *Effective Applications Development Program*.

THE SCOPE OF THE SERVICE

This is a research-based service building on INPUT's extensive research base among vendors and users. The source of the research will be continuing, in-depth analyses of the applications development experience.

The results will focus on a key question: How can the barriers to applications development effectiveness be lowered? Take advantage of INPUT's findings—and the experiences of others; this will increase the probability of achieving success.

DELIVERABLES

The service delivers its information and recommendations by means of written reports and services.

WRITTEN ELEMENTS

Standard materials will contain significant amounts of quantified data that has been statistically analyzed. The written deliverables will include extensive analysis as well as pertinent recommendations.

Effective Applications Development Program—1992

Applications Development Success Factors—This report series will use primary research to examine the factors leading to success and/or failure in applications development and in improving the process. Factors to be considered will include:

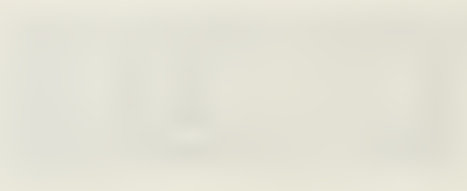
- Tool quality and integration
- The planning process
- Methodology
- Hardware and software platforms
- Vendor support
- Corporate management involvement; IS management strategies
- IS work group composition
- Training
- Applications characteristics

INPUT will provide recommendations, for users and vendors, on how to maximize the probability of success.

Applications Development Trends and Requirements—The data from INPUT's user panel will be used to show overall trends and requirements. Topics covered include:

- Stages of applications development; progression from one stage to another
- Current and planned types and levels of CASE-related resources
- Current and planned personnel skill requirements (actual versus available)
- Applications development software and systems
 - Current/planned
 - Sources
 - Satisfaction levels
- Relationship between tools and methodologies
- Current and planned training
 - Types
 - Sources
 - Gaps
- Contrast of user and vendor expectations
- Analysis of variations by industry, company size, and corporate culture

INPUT will forecast growth rates of tools and methodologies use and related markets for 1992-1997 and will analyze factors affecting growth.



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Effective Applications Development Program—1992

Organizational Readiness for CASE—INPUT's research shows that 80% of organizations identify the "soft" issues (e.g., methodology, knowledge, training, organization/culture) as being major impediments to implementing or gaining significant benefits from CASE. INPUT refers to these as "organizational readiness" issues. Those that will be assessed include:

- Corporate culture factors and impact on:
 - CASE choices
 - Planning
 - Organization
 - User relationships
 - Application selection
- Development methodology
 - Current practice/impact
 - Plans
 - Relationship to CASE
- Measurement
 - Philosophy/practice
 - Impact on CASE
 - Relation to quality
- Planning environment
 - Corporate commitment and success
 - IS planning

All these factors represent "best" practices; however, it may be infeasible or wasteful to maximize each one of these factors. INPUT's research will quantify the relative importance of these factors (and others that are identified in the course of the research) as well as indicating where there are diminishing returns in going beyond the good to achieve the best.

The Need for Vendor-Supplied CASE-Related Services—Professional services firms and systems integrators are offering a wide range of CASE-related services. To what extent will or should these be used by corporate customers, and what kind of services will be most useful? This report will answer the following questions:

- What are the reasons for turning to an outside service vendor?
- What types of services are used now? Will this change in the future?
- What has been the experience and satisfaction so far in using outside services?
- What are the strengths and weaknesses of using vendor-supplied services (as perceived by both vendors and users)?
- Are enterprises establishing enterprise-wide CASE standards to which all vendors must conform?

Effective Applications Development Program—1992

- How large a proportion of IS budgets are being spent on applications development-related services? What is this likely to be in the future?
- What types of vendors are looked on most favorably to provide these services?

These results will be quantified wherever possible (e.g., dollars, growth rates, preference ratings, etc.). INPUT will provide additional analysis and recommendations.

Applications Development User Profiles—These profiles will be a series of analyses of the experiences of selected organizations using applications development tools and methodologies including CASE. Material will be presented in a standard format that includes:

- The planning and R&D process
- Projected/actual qualitative and quantitative benefits (quality, productivity, elapsed time, etc.)
- Methodology: Current, planned
- Tool selection and experience
- Costs, by category (CASE products, training, and hardware)
- Extent of tool use: past, present, and future
- How interactions with other parts of the organization have changed as a result of changes in applications development processes
- Impact of AD/Cycle and other products
- Identification and analysis of lessons learned

User profiles will represent organizations at different levels of achievement and will be categorized by enterprise size, industry, and type of organization. Particular attention will be focused on selecting companies that have achieved success.

Vendor Profiles—Companies active in the applications development market will be profiled. Vendors will not be limited to CASE product vendors, but will include:

- Other systems software product companies (e.g., DBMS, 4GL) - Information provided will include their plans to respond to CASE and other changes in the applications development environment.
- Applications software products vendors - Information provided will include the expected impact on their products and services of changes in the applications development environment.

Effective Applications Development Program—1992

- Professional services firms - Information will be provided on their expectation of the impact of changes in applications development tools and methodologies and the types of applications development services they expect to provide to information systems and user organizations.
- Systems Integrators - Profiles will show how systems integrators expect to use applications development tools and methodologies to develop business solutions.

Information will be presented in a standard format and will include:

- Applications development-related product and service descriptions, existing and planned
- Size of CASE-related business
- CASE function specialties (e.g., design, implementation, re-engineering)
- Industry knowledge templates
- Partners and partnership strategies
- AD/Cycle strategy and implementation
- Largest and typical implementations
- CASE strategy and, if applicable, linkage to other business strategies

This information can be used to identify industry and competitive trends, to establish partnerships, and for potential customers to identify vendors.

INDEX AND CROSS-REFERENCES

Subscribers will receive a diskette that will allow them to look up topics and key words for all published materials in the program.

RESEARCH BULLETINS

Issued periodically, these will describe developments and announcements, and provide analysis of a time-sensitive nature.

Written materials will be issued in loose-leaf form. Research and analysis will be continuously delivered to subscribers as particular topics are completed.

Effective Applications Development Program—1992

SERVICE ELEMENTS

Telephone Inquiry	Use the "hotline" to obtain answers to your immediate questions.
Consultant Access	Obtain opinions and advice from INPUT executives and consultants through meetings, mail, and telephone access. (Note: Each client site will have 24 hours of telephone inquiry and consultant access time annually that is included in the standard subscription; arrangements can be made for additional time if required.)
On-site Presentation	A tailored presentation of research findings and recommendations (travel expenses additional).
Industry or Client Conference	Review the state of the industry and network with executives from other INPUT clients. Two seats are reserved per client; additional seats are available at two-thirds off the list price.

OPTIONAL DELIVERABLES

In addition to the standard deliverables described above, INPUT also offers the following optional services and information:

- An on-site review of a client's operations
- Detailed survey data in machine-readable format for client analysis

PRICING

The initial price for subscription to the standard program is \$19,950 for a twelve-month service. Arrangements can be made for subscriptions for additional sites within an organization.

Effective Applications Development Program—1992 is available from INPUT,
1280 Villa Street, Mountain View, CA 94041; Tel. (415) 961-3300,
The Atrium at Glenpointe, 400 Frank W. Burr Blvd., Teaneck, NJ 07666; Tel. (201) 801-0050,
or 1953 Gallows Road, Suite 560, Vienna, VA 22182; Tel. (703) 847-6870.

Information Services Programme—Europe

CURRENT REPORT DESCRIPTIONS

Processing Services Opportunities, 1991-1996

There will be a major restructuring of the transaction processing market over the next decade. This report will help vendors understand what changes are taking place and how they are affecting businesses. Research shows that there are significant opportunities available for vendors, despite a decline in growth rate. The report provides market forecasts and vendor rankings, with percentage market shares for each vendor.

Professional Services Opportunities, 1991-1996

This report provides market forecasts and growth rates for the European professional services market and assesses the impact of the trends in the marketplace on professional services vendors. It also discusses users' concerns and requirements so that vendors can evaluate their strengths and weaknesses. The report identifies leading vendors, providing valuable competitive information.

Software Application Solutions Opportunities, 1991-1996

This report forecasts the size of the application solutions market, identifies the leading vendors and discusses the trends affecting the market in each European country. It discusses the opportunities for applications software products and turnkey systems. It discusses market issues such as industry standards, quality and integration. The report provides valuable market intelligence for companies involved in selling and marketing software products.

Systems Software Product Opportunities, 1991-1996

This report examines the market for systems software products, segmented into systems control products, applications development tools and data centre management products. The report discusses trends such as the move towards distributed processing and assesses the likely effect on the systems software market. The impact of open systems is also discussed. Companies offering systems software products can find in this report valuable market size and growth data, analysis and competitive information.

Education and Training

This report surveys developments in education and training in the software and services industry, examining issues such as skills shortages and retraining. This report can help vendors of education and training services to assess the level of interest in various types of training services by examining the requirements for training and providing data on levels of satisfaction with training standards. The report also highlights differences in European countries, and discusses governmental issues.

Information Services Programme—Europe

CURRENT REPORT DESCRIPTIONS (*Continued*)

Software Applications Maintenance

This report examines the specific area of user-written software applications maintenance. It identifies the business opportunities in this rapidly developing business sector of the professional services market. The report also addresses such issues as the use of reverse engineering tools and provides market sizing and competitive information.

UNIX Market Opportunities

UNIX has become an important operating system as suppliers move away from their own proprietary systems. This report examines the opportunities being created in this market for consulting services and other professional services, software products and related areas. The report provides European country market analyses and competitive information.

Collaboration and M & A Issues

As European software and services companies plan their business strategies for the 1990s, many are entering new markets by entering into partnerships and acquisition activity. As companies compete against pan-European giants in a single market, it is becoming essential for them to quickly acquire market penetration into new countries, or to be able to offer new skills. This can be achieved by establishing partnerships or by seeking to acquire companies already operating in target markets. This report examines the issues and discusses the implications of such strategic activity.

Information Services Programme—Europe

RESEARCH BULLETINS

Research Bulletins are frequent, short reports that:

1. Present results from research studies as quickly as possible. These Research Bulletins communicate key findings on issues, trends, new developments and ideas, market forecasts, and vendor analysis.
2. Provide INPUT's analyses of important industry announcements, events, awards, and other activities. These Research Bulletins analyse the meaning of these activities rather than just give the news.

Research Bulletins already published that are provided immediately include:

- *Processing Services Markets*
- *Application Integration*
- *Financial Deregulation Creates Major New Opportunities for European Software and Services Vendors*
- *European Software and Services Market—Insurance Sector*
- *Market Analysis and Forecast for Western Europe—Distribution Industry Sector*
- *Software Product Specialisation in Discrete Manufacturing Drives Collaborative Ventures*
- *Preliminary Market Forecast for Western European Discrete Manufacturing Sector*
- *The Five Stages of Information System Development in Distribution Companies*
- *Preliminary Market Forecast for Western European Process Manufacturing Sector*
- *New Opportunities in Western European Process Manufacturing Sector*
- *Integration of Supervisory Control and Production Management Systems Now Imminent in the Process Manufacturing Sector*
- *European Professional Services—Market Trends*
- *European Professional Services Market Forecast*
- *Consulting and Account Management Are the Keys to the CIM Market*
- *UNIX Software and Services—European Market Issues*
- *Impact of UNIX on Software and Services Vendors*
- *UNIX Systems Software Products—European Market Forecast*
- *Software Support and Maintenance—Western European Market*
- *Daimler-Benz/Sogeti Alliance Raises Stakes for Global Leadership in Information Services*
- *Third-Party Software Support and Maintenance—User Profiles*
- *CA90s and ENTIRE—New Systems Software Architectures*
- *CAP Gemini Selects Insurance for Growth*
- *IBM's IAA Fosters Mix-and-Match Insurance Solutions*
- *The Role of Applications Software Products in the Banking Industry*

